

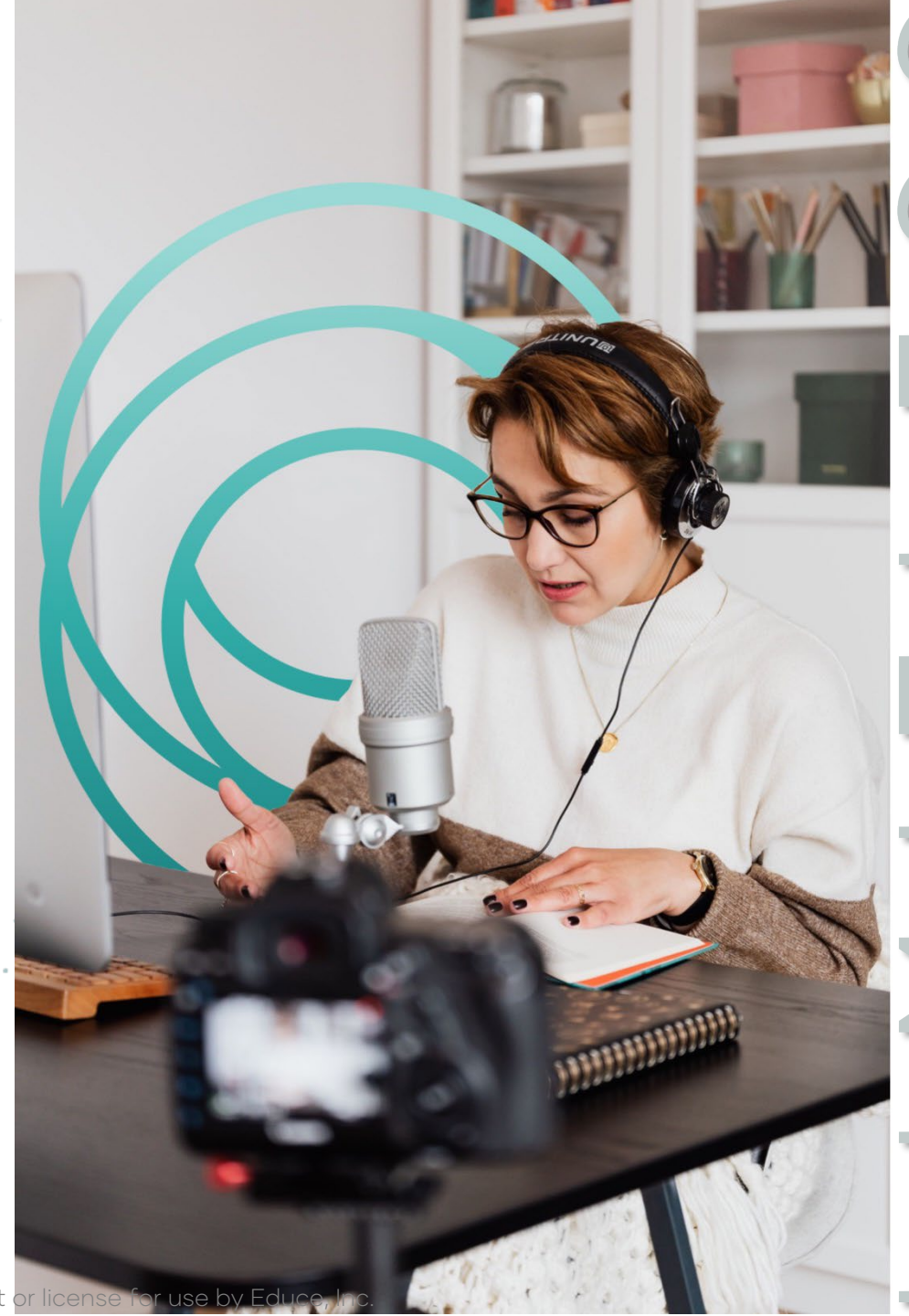
CONNECTING THROUGH WEBINARS



TIFFANY
CHARLES

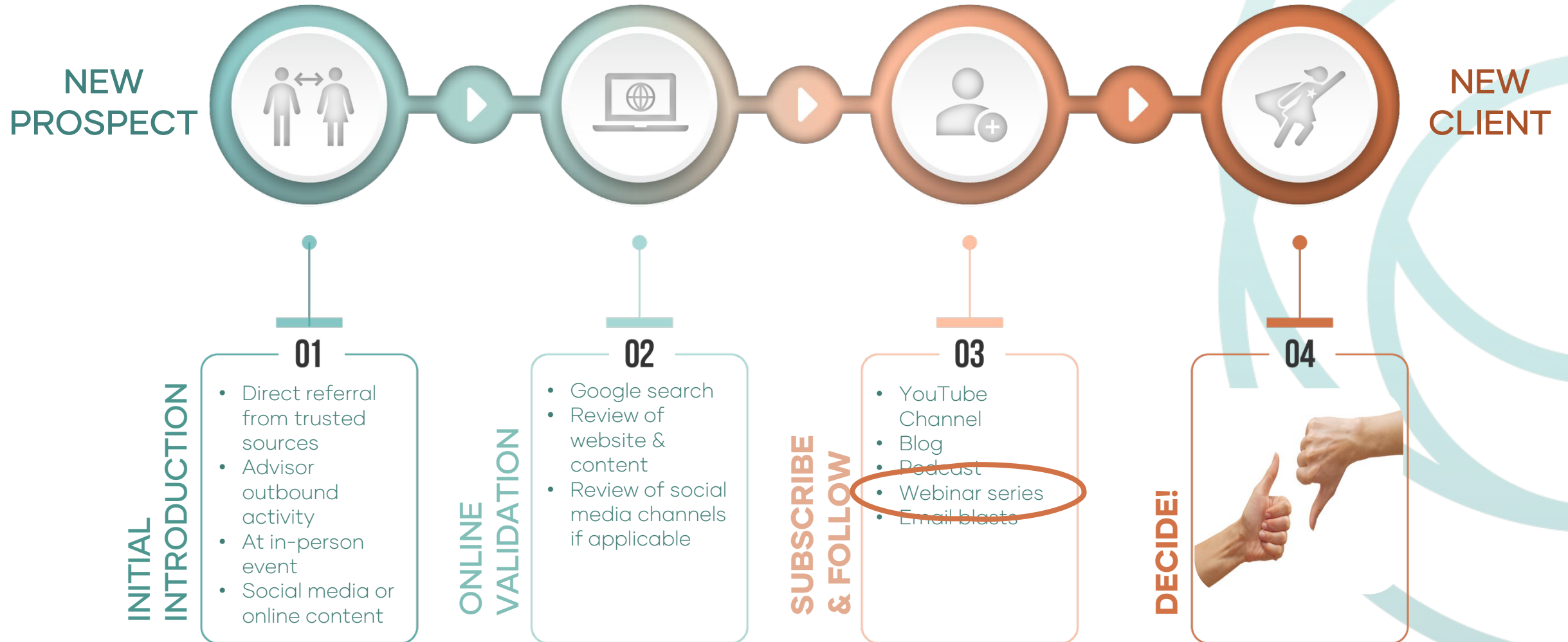


ISAAC
PRESLEY



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WHERE do WEBINARS fit into the buying journey?



The 2 Most Important Questions

An artistic composition featuring two paintbrushes with wooden handles and silver ferrules, resting on a light-colored surface. Below the brushes are several vibrant, thick splatters of paint in red, blue, yellow, and orange. A large, dark blue brushstroke is visible on the right side of the image.

What change do you
create?

A crowd of people, likely at a concert or event, with their hands raised in the air. The image is overlaid with a teal circular graphic consisting of several concentric circles. The overall tone is dark and energetic.

Who is it for?



Are webinars FOR ME?

- Establishing trust so people share their email to register
- Content that's meaningful for your ideal client
- Topic that requires 45 minutes
- Topic that's engaging enough that they want to ask questions
- Opportunity for prospects to engage deeper with you

Why WEBINARS?



Immediate *and*
long-term value
for our firm

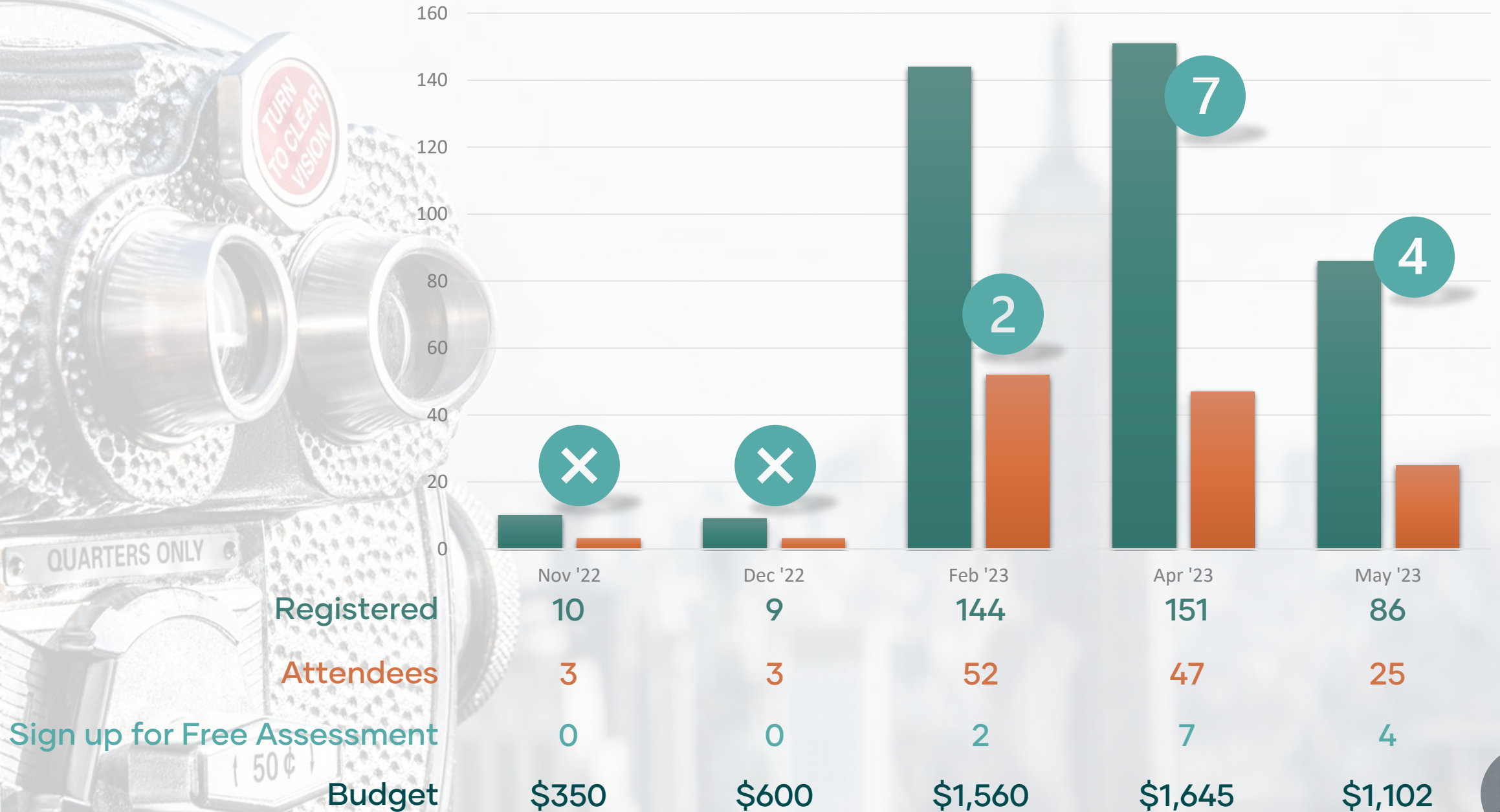


85% of
marketers who
use webinars
report they're a
"crucial" part of
their strategy



The #1 prediction
for 2023
marketing in our
industry by FMG
Suites

Nike & Microsoft Webinar Stats Case Study



CHANGE YOUR STRATEGIC THINKING:

Webinars don't convert new clients;
They create the opportunity to
convert new clients.



Destiny Capital's 6 P's

for webinar conversion

Plan*

Present

Prep

Prospect*

Promote

Post Follow-Up



Destiny Capital
generates lead
opportunities from
EVERY WEBINAR.

PLAN

What are your objectives?

How will you measure success?



Target Audience



Type



Topic



Team



PLAN



NEW WEBINAR REQUEST FORM

Using the template below, fill out all known parameters at this point and submit your completed form directly to Charissa for review and execution.

BASIC DETAILS:

What is this webinar about? Is there a title already in mind? Is there a proposed date and time? Typically, we are co-branding marketing material, but if this webinar should be individually branded DC or EA, please explain.

Webinar Title:

Date, Time, & Duration:

Brand/Logos:

PRESENTATION GOALS & SUCCESS MEASUREMENTS:

What are the objectives of this webinar?

How will we measure success?

- Registration goal:
- Attendee goal:
- Conversion goal:

PRESENTATION DETAILS:

Who is presenting/speaking during this webinar? (Highlight guests outside our firm)

-
-

Who is responsible for the content in the presentation deck? If assistance is needed in buildout of content, graphics, etc., please make a note here.

-

Do you want to provide the options for registrants to submit questions or answer any sort of poll upon registration? If so, what would you like to ask?

PROPOSED CONTENT + AGENDA

Charissa will use the information below to create marketing promotion materials, invite and Zoom registration page.

Target Audience or Attendee Profile – Who is this for?

-

Purpose: What is important about this webinar? What do you hope attendees will learn or take away? What action do you want them to take after the webinar?

-

Presentation Agenda: What topics will be covered and what key takeaway do you want them attendees to have with each topic?

-

INVITE EMAIL LIST

Typically, we are sending all mass marketing communications to the following lists:

- ✓ All Active Clients & Spouses (Destiny and Entrepreneur Aligned)
- ✓ COIs
- ✓ Prospects (DC + EA)
- ✓ Blog Subscribers (DC + EA)
- ✓ Employees (all internal team members)

If changes need to be made to the email list for this particular webinar, please explain:

-

PROMOTION TIMELINE

This is the typical timeline of a typical webinar:

Constant Contact Email & Social Campaign

Initial Email Invite (CC Email #1) / 1 st post	9 days before
*First Reminder Invite (CC Email #2) / 2 nd post	5 days before

*Second Reminder Invite (CC Email #3) / 3rd post | 2 days before

*First and Second Reminders will only be sent to those who have NOT registered yet

Zoom Automatic Reminder Emails

Zoom Webinar Reminder Email #1	7 days before
Zoom Webinar Reminder Email #2	1 day before
Zoom Webinar Reminder Email #3	1 hour before

*Zoom Webinar Reminder emails will only be sent to those who have already registered

Internal Prep

Registrant Report	Updated daily
Draft Slide Deck	At least 14 days before
Finalize Slide Deck	At least 3 days before
Webinar Practice Session	At least 1 day before

+ Follow-Up

Attendee auto follow up	Same Day
Specialized follow up	Due 2 days after
Recording	

If any changes need to be made to the timeline for this particular webinar, please explain:

-

CTAs AND RESOURCES

What are the CTAs for this webinar? Any gated material? Any give aways? Any resources we want to provide?

-

ADDITIONAL NOTES + FYIS

-

Once you are finished filling out all known parameters for this webinar in this template, submit your completed form directly to Charissa for review and execution.

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PREP

INTERNAL PREP

1. Review webinar form
2. Kick-Off Webinar Process
3. Put on Calendar
4. Make Internal Announcements

PRESENTATION CONTENT

1. Create first draft of presentation deck 14 days prior
2. Final ready 5 days prior

WEBINAR TECH SETUP (we use Zoom)

1. Schedule Webinar
2. Create registration page
3. Prepare auto emails (Reminders and Follow-up)
4. Setup Polls

CTAs

1. Coordinate the CTA – ebook, subscribe to our content, guide, worksheet, free consultation, etc...

EMAIL PROMOTION

1. Prep Original promotion email
2. Prep 1st Follow-up
3. Prep 2nd Follow-up
4. Have all finalized and compliance approved 10 days before presentation

REGISTRATION MANAGEMENT

1. Be aware of your attendees ahead of going into the presentation
2. Prep answers to pre-submitted questions *
Conversion increaser move

REGISTRATION MANAGEMENT

1. Be aware of your attendees ahead of going into the presentation
2. Prep answers to pre-submitted questions *
Conversion increaser move

SOCIAL PROMOTION

1. Prep Original promotion
2. Prep 1st Follow-up
3. Prep 2nd Follow-up
4. Create team engagement strategy
5. Have all finalized and compliance approved 10 days before presentation

EMAIL PROMOTION

No Stress Strategies to Maximize Your Microsoft RSUs

Presented by **Isaac Presley, CFA®**
CEO, Cordant Wealth

Tue, May 16, 2023
12:00 PM PST

Hi << Test First Name >>,

Learn what strategies you need as a Microsoft employee to help reduce your taxes and risk from your RSU income.

Join Cordant Wealth Partners for stress-free strategies to build your equity comp plan by learning how to:

- Leverage your RSUs to help reduce your tax bill
- How to avoid common RSU mistakes

Reserve your spot and enjoy our live Q&A with CEO of Cordant Wealth Partners, Isaac Presley, CFA® during **No Stress Strategies to Maximize Your Microsoft RSUs** on **Tuesday, May 16, 2023 at 12 pm PT.**

Hope to see you there!

Isaac Presley, CFA®
CEO
Cordant Wealth Partners

Yes, reserve my seat

No Stress Strategies to Maximize Your Microsoft RSUs

Presented by **Isaac Presley, CFA®**
CEO, Cordant Wealth

Tue, May 16, 2023
12:00 PM PST

Hi << Test First Name >>,

Do you know that RSUs make up a huge chunk of your annual income? Join us and other Microsoft colleagues as we discuss how to simplify risk from your RSU income and how to leverage your RSUs to help reduce your tax bill.

Join us for our live Q&A hosted by CEO of Cordant Wealth Partners, Isaac Presley, CFA® during **No Stress Strategies to Maximize Your Microsoft RSUs** on **Tuesday, May 16, 2023 at 12 pm PT.**

Hope to see you there!

Isaac Presley, CFA®
CEO
Cordant Wealth Partners

Yes, reserve my seat

Markets & Economy WEBINAR

REGISTER NOW

Join us...
MARKETS & ECONOMY WEBINAR
Monthly Update
DATE: Thursday, January 19, 2022
TIME: 1:00pm-1:30pm MST
WHERE: Zoom Webinar

For several years running, Tim Doyle's markets and economy updates are well-received by clients, colleagues, and partners across industries. Your consistent feedback that this monthly analysis is bringing perspective and helping to make what is occurring in the markets and economy more clear and easy to understand.

Providing education and advice that brings clarity and ease is our passion. In 2022, we were doubling down in 2023 by hosting a Markets and Economy webinar on a monthly basis. In addition to the monthly blog, you will now have direct access to Tim Doyle, Chief Investment Officer, and Jarrod Musick, CEO & Client Wealth Strategist by joining them live in a monthly discussion where we answer your questions.

You will receive a Zoom link and calendar invitation. If you have questions about this webinar, please reach out to us at **Destiny Capital (720) 715-7570** or www.destinycapital.com.

IN THE MEANTIME
Check out Tim's most recent blog post [Click to Read our Markets & Economy](#)

ANSWER?

- You will have the opportunity to submit your questions on the Zoom registration page.
- We will continue to accept your questions until the day of the webinar (please submit any additional questions as they arise to charissa.stober@destinycapital.com)
- We will prioritize pre-submitted questions and take live questions with the remaining time, take live questions with the remaining time, take live questions with the remaining time, take live questions with the remaining time.
- Feel free to share with your family, friends, and community and invite them to join you!

REGISTER NOW →

CAN'T MAKE IT? DON'T WORRY

- These monthly webinars will be recorded.
- Feel free to reply to this email or reach out to us to like to sign up only for the recording: charissa.stober@destinycapital.com

REGISTER NOW →

HOSTED BY:

Tim Doyle, CFP®, MBA
Chief Investment Officer

Jarrod Musick, CFP®
CEO & Client Wealth Strategist

REGISTER NOW →

WEBINAR AGENDA:

- I. Markets and economy data review.
- II. What's new in terms of risks and opportunities in the current climate and what does it all mean.
- III. Answers to your pre-submitted questions and with remaining time, the opportunity to ask Tim and Jarrod live questions.

DO YOU HAVE SPECIFIC QUESTIONS YOU'D LIKE US TO

Social Promotion LinkedIn

Tuesday, May 16, 2023 @ 12pm PT



No Stress Strategies to Maximize Your Microsoft RSUs

- How to leverage your RSUs
- When to sell your RSUs & diversify your investments
- How to avoid common RSU mistakes

Presented by
Isaac Presley, CFA®
CEO, Cordant Wealth

CORDANT
Wealth Partners

Event ended

No Stress Strategies to Maximize Your Microsoft RSUs

Event by Cordant Wealth Partners

Tue, May 16, 2023, 12:00 PM - 12:45 PM (your local time)

Online


Event link · https://us02web.zoom.us/webinar/register/WN_I5o95jdNTYiAym8zU1gbWQ

Peter Johnson and 63 other attendees

Share Manage

Reminder: Markets & Economy Webinar | Monthly Update starts in 1 day

Charissa Stober <no-reply@zoom.us>
To: Tiffany Charles



Hi Tiffany Charles,
This is a reminder that your webinar will begin in 1 day:

Markets & Economy Webinar Monthly Update	
Date & Time	Jan 19, 2023 01:00 PM Mountain Time (US and Canada)
Webinar ID	815 9439 6373
Passcode	991088
Description	HOSTED BY: Tim Doyle, CFP®, MBA Chief Investment Officer Jarrod Musick, CFP® CEO & Client Wealth Strategist

Destiny Capital
287 followers
1w ·

NEW WEBINAR ALERT: For several years running, Tim Doyle's monthly blog—Markets and Economy Update—has been well-received by clients, colleagues, and partners across industries. Starting this month and each month thereafter, you will have the opportunity to join Tim Doyle, Chief Investment Officer, and Jarrod Musick, CEO & Client Wealth Strategist for a live webinar where additional insights will be shared about our markets and economy and pre-submitted questions from attendees will be answered.

Please join us this Thursday, January 19 @ 1:00-1:30pm MST

CLICK HERE TO REGISTER: <https://lnkd.in/gtbhHdyk>

We hope you join us live, but if you can't, please don't worry, each webinar will be recorded and made available upon request.

#destinycapital #markets #economy #webinar #investmentplanning

Markets & Economy WEBINAR

REGISTER NOW

Thursday, January 19
1:00-1:30pm MST



Jarrod Musick, CFP®
CEO & Client Wealth Strategist

entrepreneuraligned

ZOOM LANDING PAGE

This webinar has ended.



CORDANT
Wealth Partners

Presented by
Isaac Presley, CFA®
CEO, Cordant Wealth

No Stress Strategies to Maximize Your Microsoft RSUs



Tue, May 16, 2023
12:00 PM PST

Register below to watch it on-demand.

Topic	No Stress Strategies to Maximize Your Microsoft RSUs
Description	<p>As a Microsoft employee, RSUs make up a huge chunk of your annual income. But taxes and volatile stock prices make managing the vesting and fluctuating income from your equity compensation a challenge. In 2023, simplify your equity comp strategy and help reduce the taxes and risk from your RSU income.</p> <p>In this webinar, we'll cover everything you need to know to build your equity comp plan, including:</p> <ul style="list-style-type: none">-How to leverage your RSUs to help reduce your tax bill-When, if, and how to sell your RSUs & diversify your investments-How to avoid Common RSU mistakes <p>In addition, we'll be hosting a live Q&A with CEO of Cordant Wealth Partners, Isaac Presley, CFA®.</p>



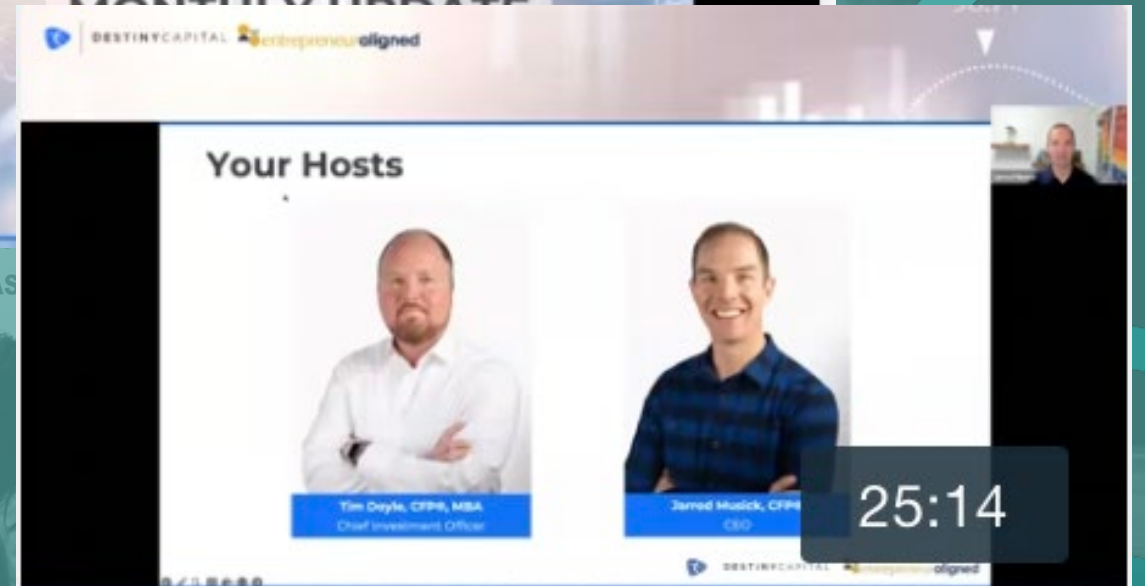
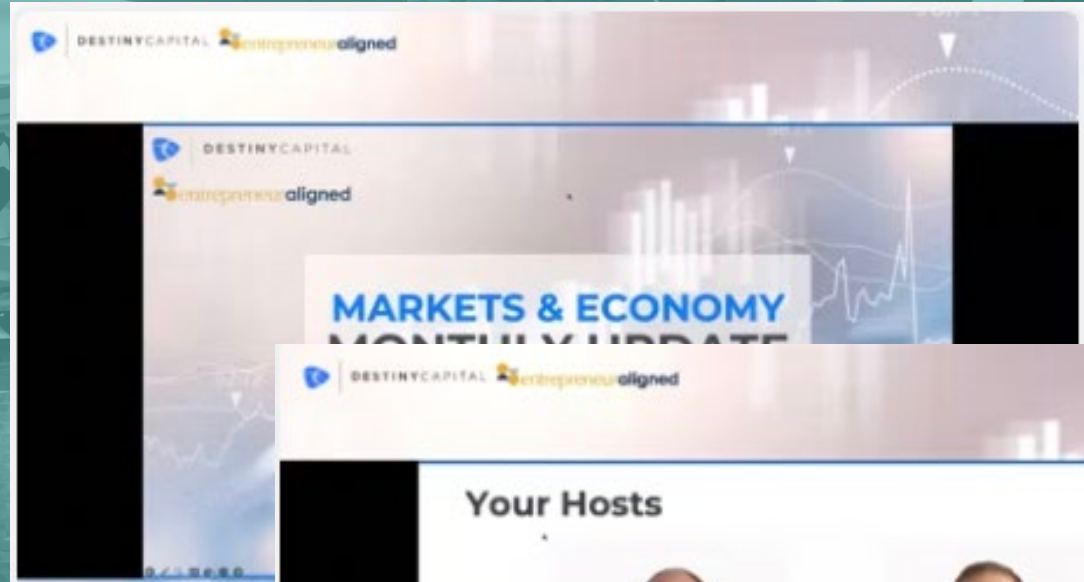
PRESENT

Roles:

Host, Presenter, Person in Chat/Moderator

Checklist of To Do's:

- Record
- Polls
- Time management
- Question management
- Provide the CTA items



PROSPECT

This is where conversion magic exists.

Have your lead nurturing and prospect process ready to go.



Isaac Presley <isaac@cordantwealth.com>

to sarkarabh ▾

Hi Abhijit,

I hope I was able to answer your RSU question during the webinar Q&A but let me know if you'd like to explore this further.

We'd be happy to explore doing [a free assessment](#) for you if you're interested.

Best,
Isaac

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Isaac Presley, CFA



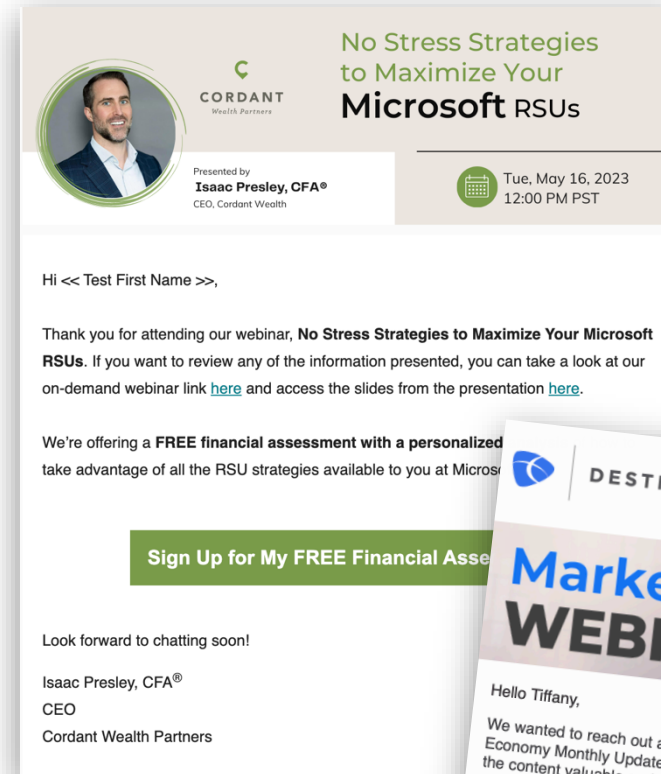
Post-Webinar Email

WE INCLUDE:

*Recording, Deck, CTA,
Feedback Survey*

MY FINAL CHECKLIST:

- Add attendees to nurture system
- Have 15-minute debrief w/ team
- Gather feedback & provide to team
- Gather metrics, analyze performance of webinar
- Create content recycle strategy
- Personalized follow-up strategy for attendees & for those that missed



Start SMALL
Be CONSISTENT
Get BETTER





LEARN MORE

- Attend and study the inner workings of other advisors' webinars
- Listen to Kitces FAS Podcast Episode 243 with James Bogart



ADAPT & APPLY

- Use the Webinars worksheet to define and delivery on your webinars.



TAKE ACTION

- Rip off and deploy!



LIMITLESS Q&A