



# TELLING YOUR STORY

How to Share What You Do  
in a Way That Really Works

*TELL Your Story, Don't SELL Your Story*



**WHAT I  
DO**

The Value I Add



**WHO I  
DO IT FOR**

I Do My Best Work  
With...



**WHAT  
IT COSTS**

How I Charge

# DANGER: SALESPERSON



WHICH IS WHY FINANCIAL ADVISORS NEED TO GET OVER THEIR

CRISIS

*of* CONFIDENCE





# THE *Sweet*SPOT

PERSUASIVE  
EDUCATOR

Noise-Maker

Salesperson



L I M I T L E S S

FUNCTIONAL

EMOTIONAL



# WHAT I DO

## Shifting Focus

SELLING  
PROJECTIONS  
PRICE

SERVING  
PARTNERSHIP  
VALUE

FEATURES & BENEFITS

OUTCOMES & EXPERIENCES

Your Value Is  
**ADVICE**



Not  
**INFORMATION**

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# 3 VALUES



Accelerate Your Success



Gain Back Time & Freedom



Build a Wildly Successful  
Business And Life That  
You Love

# WHO I DO IT FOR

- © *Clarity* regarding who you do your best work with
- © *Enables* specialization and
- © *Creates* gravity

## 3 QUALITIES

OF A "RIGHT" CLIENT:  
FIT YOUR IDEAL CLIENT PROFILE / NICHE, *AND ARE...*



MOTIVATED



ABLE TO SEE THE  
VALUE



WILLING  
TO PAY

# BREAK THROUGH

The  
Background  
Noise

# Two Requirements:

1. Clear Client Avatar
2. Compelling CTAs



## Demographics

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## Pain Points

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



## Demographics

Age 50+

\$1MM+ Investable Assets

Low Expenses, Zero Debt

## Pain Points

Tsunami of RMDs

Surviving Spouse  
Lacks Expertise

Not Where They Want  
to Spend Time

Worried about Making Mistakes

# Client Avatar

## Demographics

- Profession (e.g., Optometrist, SLP, Dentist)
- Employer (e.g., Intel, Amazon, Qualcomm)
- Employment position (e.g., Senior Developer, C-Suite)
- Compensation type (e.g., W2, RSUs, Contractor)
- Marital/dependent status
- Age or generation (e.g., Millennials, Gen X/Y)
- Income
- Tax bill (e.g., paying \$300,000+ in taxes per year)
- Savings rate or amount (e.g., saving 70% of income, maxing out retirement accounts)
- Business owner (gross revenue, # of employees, Pre IPO)
- Geographic location

## Pain Points

- “Don’t know what we don’t know”
- Make work optional
- Organize and simplify finances
- Mitigating taxes while working
- Navigating/maximizing/understanding complex comp
- \$\$\$ stuck in business (how to sell a fund retirement)
- Career stagnant
- Starting a business
- Student loan debt
- Cash flow challenges
- Liquidity event, inheritance, death, divorce

# the PRODUCT

Features & Benefits

Deliverables & Returns

# the PARTNER

Advice

Experience

# COST

"Price is only  
an issue in  
the absence  
of value."

# VALUE



# WHAT IT COSTS

“ In my XX years of experience, these plans ARE worth multiples of the fee. But my reputation is far more important than the planning fee, which means that if YOU have any doubts about the value of the plan I provide for you, I will refund my entire planning fee with no hassle. ”



See Prospect Process and Finding Your Fee Model for more information on fees!

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# YOUR DIGITAL STORY



HERO HEADLINE



TARGET MARKET



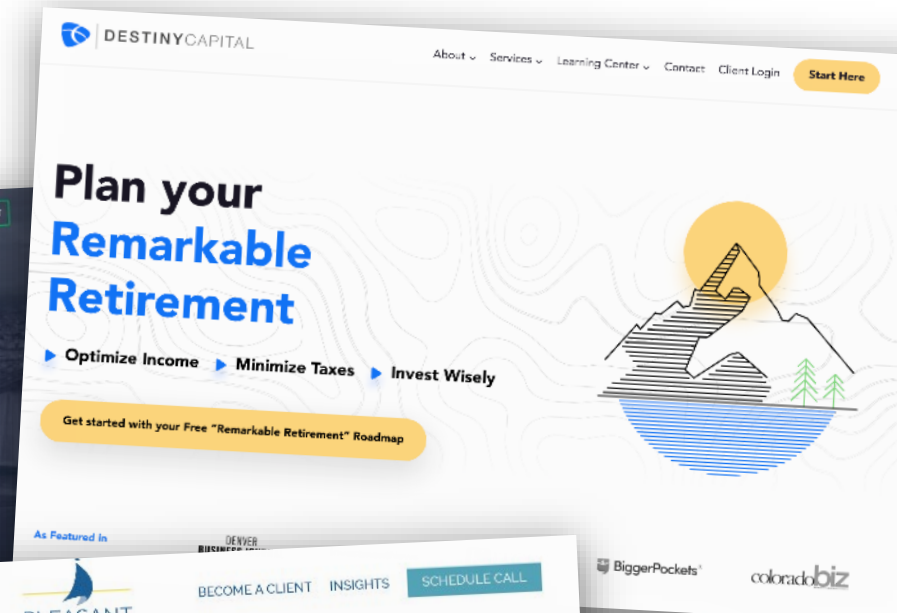
VALUE PROPOSITION



THE OFFER



SOFT NEXT STEP



SHOW UP AND TELL

*Your Story*

UNAPOLOGETICALLY

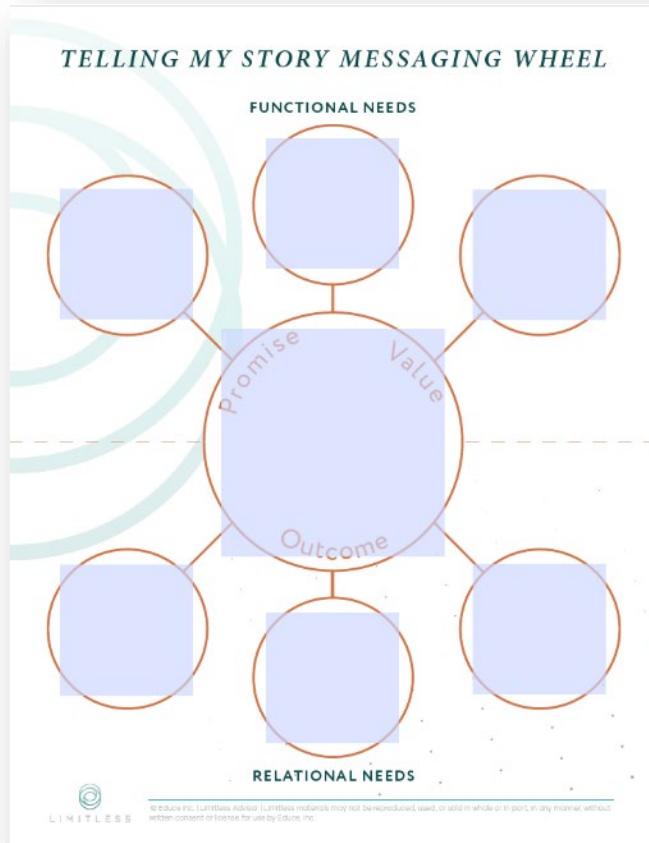




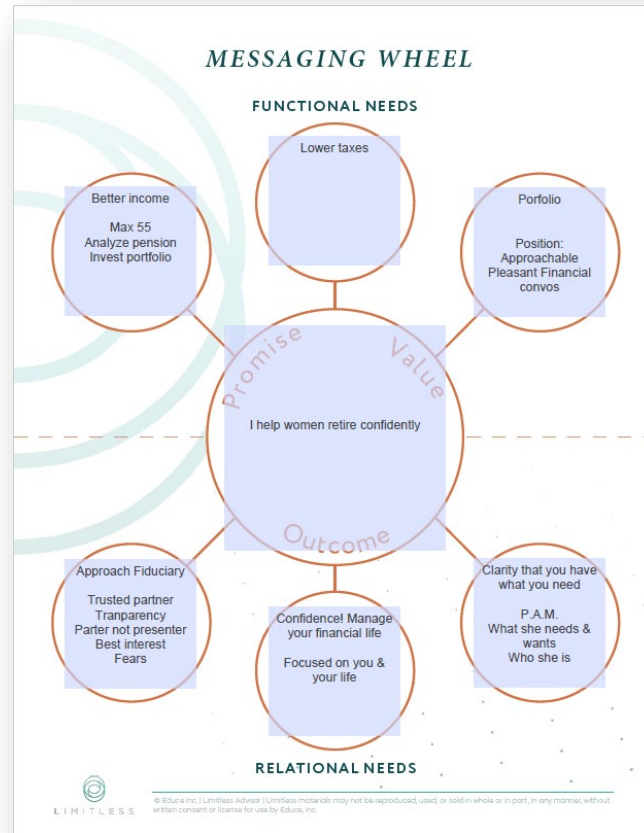
# MAKING IT POP!

Putting It All  
Together

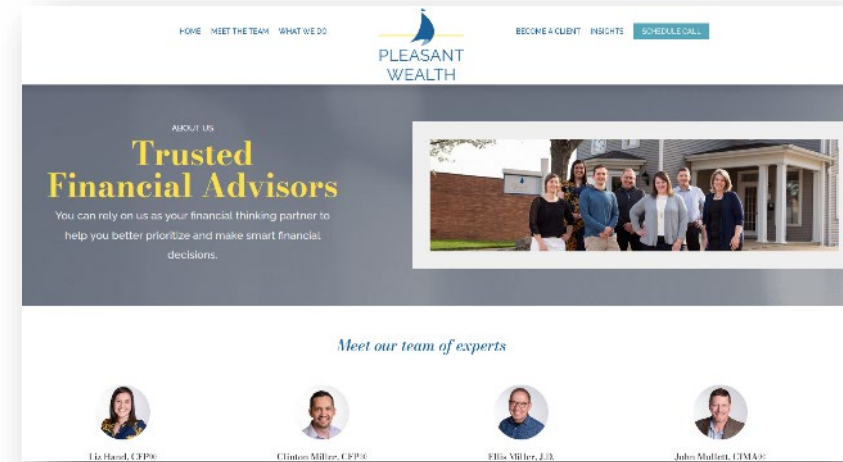
# MESSAGING WHEEL



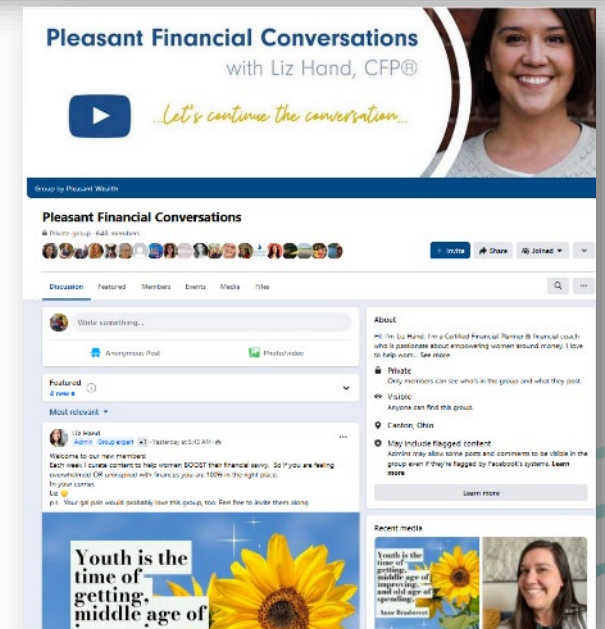
TEMPLATE



SAMPLE



IN ACTION



# In Practice

BUILDING YOUR STORY MESSAGING

I HELP \_\_\_\_\_

TO \_\_\_\_\_

SO THAT THEY CAN

\_\_\_\_\_

\_\_\_\_\_

AND \_\_\_\_\_.

CRAFT YOUR STORY

LIMITLESS

## What I Do Worksheet

Use this worksheet to frame your core messaging using simple techniques for communicating what you do and the value you add.

I help \_\_\_\_\_ to  
\_\_\_\_\_ so that they can  
\_\_\_\_\_,  
\_\_\_\_\_,  
and \_\_\_\_\_.

Example: I teach people how to retire.

Example (extended): "I teach hard working retirees how to turn their savings into a secure retirement so they can reduce taxes, max retirement income and retire comfortably knowing the money they worked hard for is now working hard for them."

### What I do Script:

Limitless Sample

- On a plane: I'm a business coach for financial service founders
- At a networking event: I'm a strategy consultant & high-performance coach for growth-minded founders ready to accelerate their success and grow their income/build value without giving up their time and freedom
- On a website hero headline: Work with greater success. Live with Greater Freedom.

### I Help Version of What We Do:

Limitless Sample

I help growth-minded financial advisors to master their mindset and methods so that they can accelerate their success, drive growth, and gain back their time and freedom.



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## LEARN

- How to Define Your Value, *Stephanie Bogan*
- Scripts, *Nick Murray*
- Mastering Marketing as a Solo Advisor By Simply Sharing Your Authentic Self, *Eric Roberge & Michael Kitces*
- Storyselling for Financial Advisors: How Top Producers Sell, *Mitch Anthony & Scott West*
- 6 Key Value Propositions a Good Financial Planner Can Provide, *Michael Kitces*



## APPLY

- **Complete**  
the What I Do worksheet and Messaging Wheel Worksheet to get clear on and master your brand message
- **Use**  
the Brand Brief Tool and Brand Design Template to determine or refine your brand



## ACT

- Practice telling your story out loud 3x day for 30 days (add to Success Shifter)
- Update your website value proposition, brand messaging and storytelling strategies
- Update sales funnel and prospect-process scripts and communications to reflect updated story messaging

# Q&A

