

Telling **your**  
story defines  
the value  
you deliver to  
clients.

LIMITLESS

# Telling Your Story Workbook



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## Introduction

There's no question that financial advisors deliver immense value to their clients' lives. Yet, too many advisors struggle with articulating their story in a way that's clear, compelling, and confident. Your story isn't just about the work you do; it's about who you do it for and the unique value you provide. When you tell your story effectively and succinctly, it speaks for itself—you won't need to sell it.

Instead of pushing your message, you'll simply share it, allowing your audience to see the value in working with you on their own. No high-pressure sales tactics needed.

Shift the focus from listing your knowledge, attributes, or services to highlighting the problems you solve, the experiences you create, and the outcomes you deliver. Being a Trusted Advisor starts with telling your story in a way that communicates, "I see you, I understand you, and I'm here to help."

This workbook is designed to help you define, draft, and deliver a story that clearly conveys who you are, what you do, and how you serve as a Trusted Advisor.



### Best Practice: Tell, Don't Sell, Your Story

You want to grow your client base, but the last thing you want is to come across like a pushy salesperson. The good news? You don't have to.

Your job is not to sell your story. Your job is to share it in a clear, concise and compelling way to garner the attention and curiosity of your ideal prospects.

In essence, you don't need to be aggressive or insincere to attract and serve new clients. The key is to clarify your value and package that into a story that says you see, hear and understand your prospects – and know how to help.

## Understanding Client Issues, Needs, and Pain Points

In today's information-saturated world, capturing a prospect's attention is more challenging than ever. The key to breaking through the noise is to communicate in a way that feels deeply personal and relevant to the individual on the other side of the conversation. As a financial advisor, your ability to do this hinges on your understanding of your clients' issues, needs, and pain points.

When you take the time to truly understand what keeps your clients up at night—whether it's the fear of outliving their savings, the stress of managing debt, or the anxiety around



providing for their family—you can craft a story that resonates on a deep emotional level.

This isn't just about delivering a pitch; it's about delivering a message that communicates the most important words of all: "I see you. I hear you. I understand you."

Understanding your clients at this level allows you to move beyond generic advice and offer tailored solutions that feel real and relevant. When your message speaks directly to their specific concerns, prospects are more likely to think, "Hey, they're talking to me. Those are my issues. Maybe they can help."

This approach is crucial because of how our brains work. In an environment flooded with information, our minds are wired to filter out the irrelevant and focus on what feels personally significant. By tapping into this, you can cut through the background noise & capture the attention of your prospects in a meaningful way.

By diving deeper into your clients' issues, needs, and pain points, you can craft a story that not only captures attention but also builds trust and connection. It's this level of understanding that sets you apart as a trusted advisor.

## Building Your Story Framework

As the advisory profession evolves, the benefits of working with a financial advisor are becoming more widely recognized.

When crafting your story, consider the following key areas of value to ensure you clearly communicate what you do and the impact you deliver:



**Objective Insight:** As an objective guide, you help clients navigate financial decisions with transparency, steering them away from emotional pitfalls.

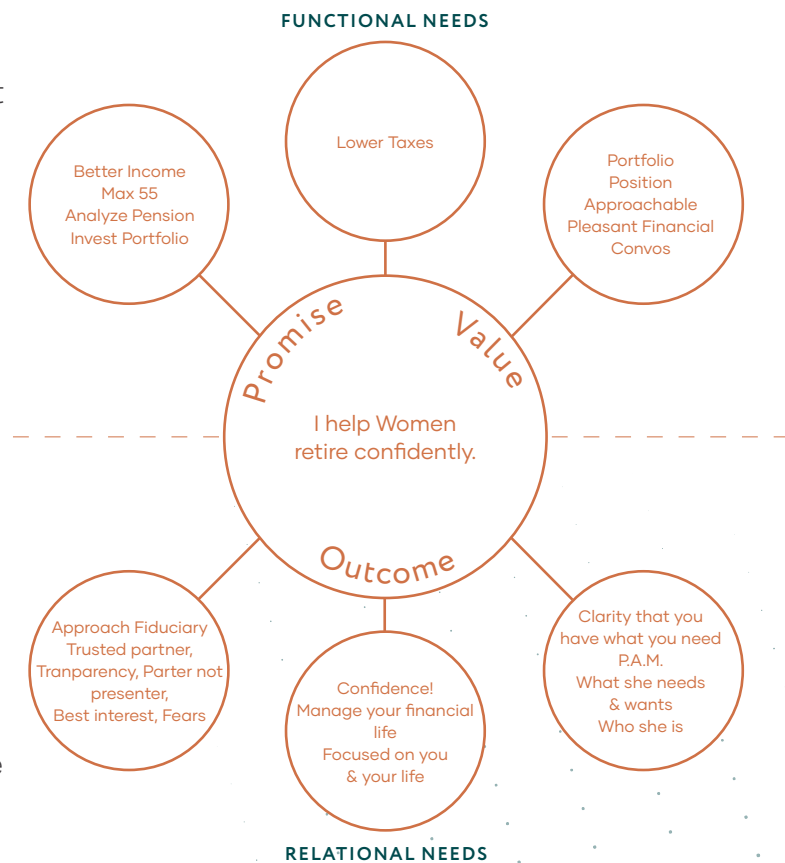


**Goal Guidance:** Starting with the creation of financial goals, you ensure that your clients set challenging yet attainable targets, preventing discouragement and fostering long-term commitment.



**Goal Tracking:** You act as a reliable reporter, keeping clients informed about their progress towards their financial goals, offering them peace of mind.

## MESSAGING WHEEL





**Portfolio Design:** You don't just manage portfolios—you design them to fit each client's unique goals and risk tolerance, distinguishing yourself from the crowd.



**Tax Management:** By taking on the complexities of tax management, you relieve clients of a significant burden, enhancing their confidence in their financial plan.



**Behavioural Management:** As a calm, knowledgeable moderator, you help clients navigate market volatility and avoid emotional decision-making.



**Long-Term View:** You help clients plan for their future, from retirement to education funding, ensuring they stay on course to meet their long-term goals.



**Holistic Problem Solving:** With the rise of technology, your role as a financial advisor shifts from investment management to solving broader financial challenges, simplifying your clients' financial lives through a comprehensive relationship.

## Key Value Drivers

We, alongside industry leaders like Michael Kitces and Mitch Anthony, believe that your value as an advisor lies in enhancing your clients' financial lives in ways that have meaning beyond their money.

This approach focuses on the outcomes that truly matter to clients—positive financial results and peace of mind. Here are six key value drivers to include in your brand and story messaging:



**Organization:** Help clients get their financial house in order, from investments to cash flow management.



**Accountability:** Keep clients focused on their goals, regularly reviewing their progress and keeping them on track.



**Objectivity:** Provide stability and transparency, helping clients avoid emotionally-driven decisions.



**Proactivity:** Anticipate and prepare clients for major life transitions, offering tailored advice and planning.



**Education:** Serve as a trusted educator, helping clients understand their financial options and the associated risks.



**Partnership:** Build a collaborative relationship with clients, working together to achieve their best life possible.

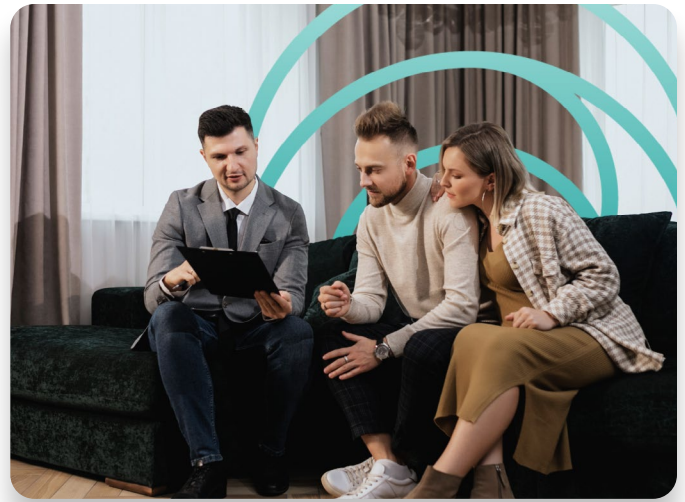
Incorporating these value drivers into your story helps to create a compelling narrative that communicates the intangible value you provide to meet prospect needs.



# Bringing Structure to Your Story

Crafting a compelling story that resonates with prospects requires more than just knowing what you do—it's about clearly communicating the value you bring in a way that connects on both a technical and behavioral level.

The following worksheets are designed to help you structure your story, ensuring that every interaction you have with prospects is clear, concise and compelling:



## BRAND MESSAGING WHEEL

The Brand Messaging Wheel worksheet helps you brainstorm prospect issues, needs, and pain points from both technical and behavioral perspectives. By integrating these insights into your story, you can craft a narrative that resonates deeply with your audience.



## WHAT I DO WORKSHEET

This worksheet helps you articulate your story by defining what you do (the value you add), who you serve (your ideal client), and, when relevant, how you charge. Use it to craft a clear, compelling response that confidently conveys your unique value and expertise.



## VALUE MESSAGING WORKSHEET

The Value Messaging Sheet helps you articulate the full scope of value you provide, addressing both technical and behavioral aspects. It guides you in crafting a 'before & after' story (intangible value), detailing solutions and benefits (tangible value), and defining the key outcomes, roles, approach, and processes that showcase your comprehensive client impact. Use this worksheet to ensure your value is communicated clearly and effectively in deeper client conversations.

To effectively define and deepen your messaging, take the time to complete each of these worksheets. By doing so, you'll develop a well-rounded narrative you can confidently use in various conversations and settings to deliver a story that resonates with your audience.



### Recommended Reading

HOW TO DEFINE YOUR VALUE,  
~ Stephanie Bogan

HOW TO SELL YOURSELF – 8 POINTS  
FOR EVERY FINANCIAL ADVISOR  
~ Orion Portfolio Solutions

6 KEY VALUE PROPOSITIONS A GOOD  
FINANCIAL PLANNER / SEEKING A  
BETTER 'RETURN ON LIFE',  
~ Michael Kitces

# VALUE MESSAGING WORKSHEET

Complete this worksheet to help you clarify, define and package your brand messaging points into a clear, concise and compelling prospect story.

## IDEAL CLIENTS

Who are your ideal clients? List the top 5-10 characteristics of the clients your message intends to attract.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

### FROM HERE | BEFORE STATE

### SOLUTIONS & BENEFITS

### TO HERE | AFTER STATE

## WHAT I DO

What I Do & The Value I Add

What is the work you do? And what is the main impact, outcome and/or experience you help to create with your work?

## THE VALUE OFFER

Describe the 3 key (client-centric) outcomes you help create. Include 2-3 points that support these points in more detail.

Key Outcome #1:

Supporting Points

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

Key Outcome #2:

Supporting Points

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

Key Outcome #3:

Supporting Points

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

## 3 KEYS

Define the 3 messaging points that best support your role, approach you take and process you follow for delivering value.

Define key points regarding the **ROLE** you play as their Financial Advisor

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

Define key points regarding the **APPROACH** you play as their Financial Advisor

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

Define key points regarding the **PROCESS** you play as their Financial Advisor

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

# PUTTING IT ALL TOGETHER

Use this outline to help you put the key points of your brand messaging into a story script to help guide your conversations.

## THE SIMPLE STORY MESSAGE

Turn your key points into simple, value-based explanation of what you do, the value you add, who you do it for and, ultimately, the fees that you charge.

NOW TURN THE ABOVE LANGUAGE INTO A SIMPLE, SUCCINCT, STRAIGHT-FORWARD SENTENCE:

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

WHAT I DO	
THE VALUE OFFER	
3 KEYS	

## HOW I CHARGE

My fees for (financial planning) are...

