

“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.

