KITCES SUMMIT

KITCES DIGITAL MARKETING SUMMIT

See Behind the Scenes of Successful Advisor Marketing

May 13, 2021

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Introduction

This workbook is designed to help you capture key notes as you go behind the scenes with our expert guests during the information-packed Summit. There is space within this workbook for you to start mapping out your plan of action.

Don’t forget, Recap Notes will also be provided to you a few days after the Summit to help you review anything that you may have missed.

Marketing Funnel Concept

When it comes to marketing, there's no one "thing" advisors can do to attract and win clients, because turning strangers into leads and then into prospects and, finally, clients is a multi-stage process. But there is one rubric to follow: The Marketing Funnel.

The Kitces Marketing Summit will focus on what marketing success looks like at every stage of the marketing funnel, and help you see new possibilities about how to leverage your marketing dollars at each point along the way.

Top of Funnel

It doesn't matter how good your website is if no one sees it. See what it takes to get noticed with SEO and Facebook advertising.

Middle of Funnel

Few prospects are ready to hire you the first time they visit. See what it takes to engage them with blogging and email marketing to keep them coming back.

Bottom of Funnel

Even a good list of leads may still need a nudge to take action and become clients; see what it takes to build systems that both standardize the process and specialize the experience for every prospect.

Agenda

Expert guests will take you behind the scenes with real-world examples of what advisors can do at every stage of the marketing funnel to attract clients, build trust, and increase loyalty.

Figure out the Right Amount of Money to Spend on (Digital) Marketing Strategies

Michael Kitces, MSFS, MTAX, CFP, CLU, ChFC, RHU, REBC, CASL
Founder & Editor in Chief, Kitces.com

Create a Website That Supports a Proper Funnel Designed to Convert

Taylor Schulte, CFP
Founder, Define Financial

Making Facebook Algorithms Work in Your Favor

Samantha Bezar
President, Quantum Leap Systems, LLC

Craft Your SEO Strategy to Make It Your New "Compounding Interest"

Chad Chubb, CFP, CSLP
Founder, WealthKeel, LLC

Make Marketing Campaigns Unique to Your Brand, Firm, and Company Goals Through Specialized Onboarding

Brittney Castro, CFP, AAMS, CRPC
Founder & CEO, Financially Wise Inc.

Keep a Lead's Engagement Through Email Campaigns

Peter Lazaroff, CFA, CFP
Chief Investment Officer, Plancorp

Build Systems to Specialize Your Client's Experience During the Sales Process

Adam Cmejla, CFP
Founder, Integrated Planning & Wealth Management, LLC

Standardize the Conversion Process and Personalize the Advice

Kris Venne, CFP
Founding Partner, Ritholtz Wealth Management

Michael Kitces

Figure out the Right Amount of Money
to Spend on (Digital) Marketing Strategies

Session Notes

Michael Kitces

Figure out the Right Amount of Money to Spend on (Digital) Marketing Strategies

Key Takeaways From This Session

Plan Of Action

What is the first (small) action you're going to take in the coming week to move forward?

Taylor Schulte

Create a Website That Supports a Proper Funnel Designed to Convert

Session Notes

Taylor Schulte

Create a Website That Supports a Proper Funnel Designed to Convert

Key Takeaways From This Session

Plan Of Action

What is the first (small) action you're going to take in the coming week to move forward?

Samantha Bezar

Making Facebook Algorithms Work in Your Favor

Session Notes

Samantha Bezar

Making Facebook Algorithms Work in Your Favor

Key Takeaways From This Session

Plan Of Action

What is the first (small) action you're going to take in the coming week to move forward?

Chad Chubb

Craft Your SEO Strategy to Make It Your New "Compounding Interest"

Session Notes

Chad Chubb

Craft Your SEO Strategy to Make It Your New "Compounding Interest"

Key Takeaways From This Session

Plan Of Action

What is the first (small) action you're going to take in the coming week to move forward?

Brittney Castro

Make Marketing Campaigns Unique to Your Brand, Firm, and Company Goals Through Specialized Onboarding

Session Notes

Brittney Castro

Make Marketing Campaigns Unique to Your Brand, Firm, and Company Goals Through Specialized Onboarding

Key Takeaways From This Session

Plan Of Action

What is the first (small) action you're going to take in the coming week to move forward?

Peter Lazaroff

Keep a Lead's Engagement Through Email Campaigns

Session Notes

Peter Lazaroff

Keep a Lead's Engagement Through Email Campaigns

Key Takeaways From This Session

Plan Of Action

What is the first (small) action you're going to take in the coming week to move forward?

Adam Cmejla

Build Systems to Specialize Your Client's Experience During the Sales Process

Session Notes

Adam Cmejla

Build Systems to Specialize Your Client's Experience During the Sales Process

Key Takeaways From This Session

Plan Of Action

What is the first (small) action you're going to take in the coming week to move forward?

Kris Venne

Standardize the Conversion Process and Personalize the Advice

Session Notes

Kris Venne

Standardize the Conversion Process and Personalize the Advice

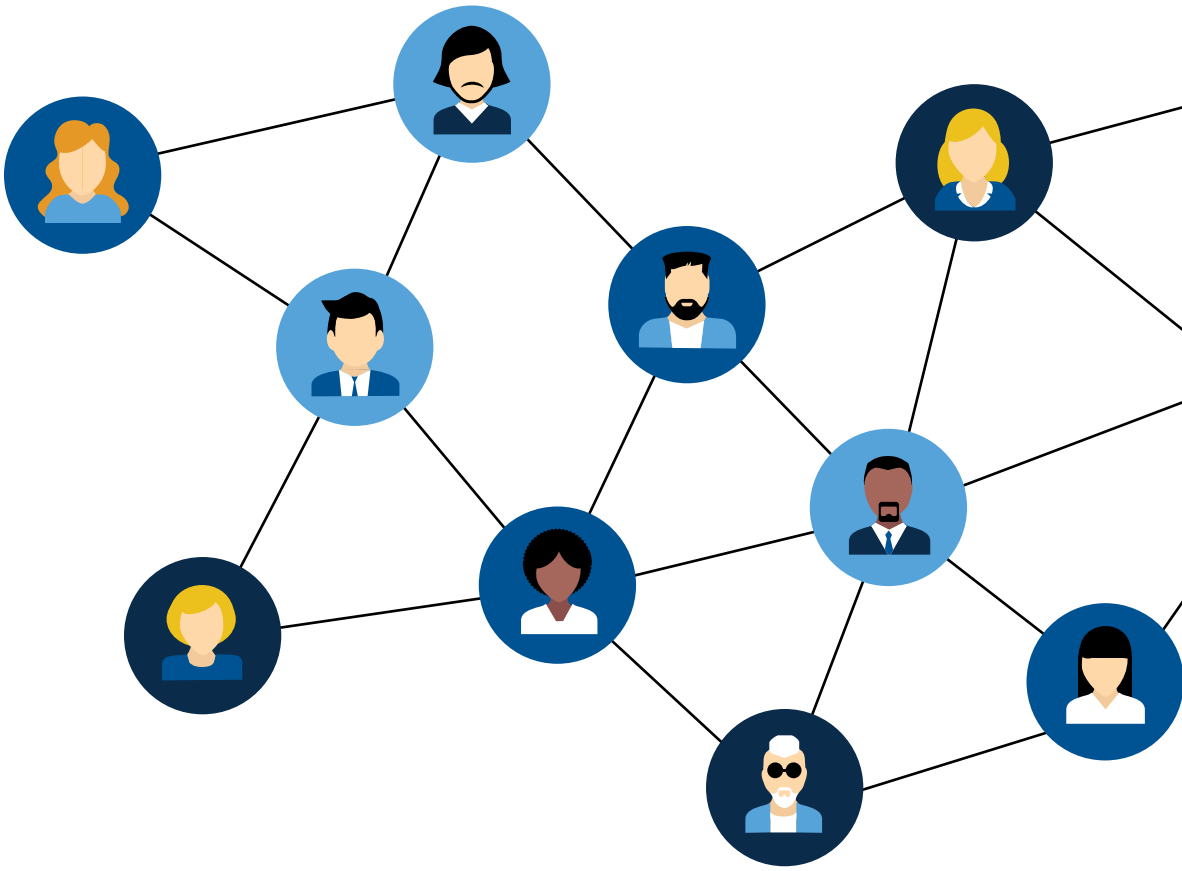
Key Takeaways From This Session

Plan Of Action

What is the first (small) action you're going to take in the coming week to move forward?

Community Conversation

The Kitces Summit Community Conversation will provide a space to process the information from the main Summit event with your peers. During this time, you will be able to discuss ideas, solve pain points, and get your questions answered by several experts. You'll also have the opportunity to collaborate with fellow advisors, discuss your plan of action, and (maybe) find yourself an accountability partner!



Breakout Group Instructions

Take this opportunity to get to know the advisors in your breakout group. Use the following space to capture their basic info and current marketing strategy.

During the first breakout session, your group will be asked to decide on one question that you want to submit for the experts to answer in the ensuing Q&A.

Select one person from your group to add the question to sli.do using code #KitcesSummit.

During the second breakout session, simply take the time to discuss key takeaways and next steps with your fellow advisors.

Breakout Group

Round One Notes

- **Name:** _____
- **Firm:** _____
- **Location:** _____
- **What are they currently doing to market and get new clients?**

- **Name:** _____
- **Firm:** _____
- **Location:** _____
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- **What are they currently doing to market and get new clients?**

- **Name:** _____
- **Firm:** _____
- **Location:** _____
- **What are they currently doing to market and get new clients?**

What one question will your group submit to the experts for the Q&A?

Select one person from your group to add the question to sli.do

Breakout Group

Round Two Notes

- **Name:** _____
- **Firm:** _____
- **Location:** _____
- **What are they currently doing to market and get new clients?**

- **Name:** _____
- **Firm:** _____
- **Location:** _____
- **What are they currently doing to market and get new clients?**

- **Name:** _____
- **Firm:** _____
- **Location:** _____
- **What are they currently doing to market and get new clients?**

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- **What are they currently doing to market and get new clients?**

What are the ideas you've gathered from this group?

Closing

Thank you for joining us for the Kitces Digital Marketing Summit! We're so glad you spent time with us going behind the scenes of successful marketing strategies, and we hope you are inspired to apply some of what you learned in your own practice!

While not all of the ideas shared will be relevant for you, it's crucial that you create a marketing strategy that suits your firm and your area of focus. By participating in this Kitces Summit, we hope to have opened your eyes to new marketing possibilities that can help you turn strangers into leads and leads into clients!

As you take the insights shared and apply them in practice, I'd love for you to share with us your stories of positive outcomes that you encounter along the way by emailing us at summits@kitces.com. Your continued feedback is something we always want to hear!

Please stay tuned for more Kitces Summits in the future!

Best,
Michael

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