



KITCES
SUMMIT

KITCES MARKETING SUMMIT

User Education-Based Marketing To Show Your (Unique) Expertise

April 19, 2022

In this workbook

- Introduction 3**
- Education-Based Marketing..... 4**
- Agenda 5**
 - Michael Kitces..... 7
 - Taylor Schulte 9
 - Casey Weade 11
 - Anna N’Jie-Konte 13
 - Tushar Kumar 15
 - Pamela Capalad..... 17
 - Isaac Presley 19
 - Justin Goodbread 21
- Community Conversation 23**
- Closing..... 24**

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.

Education-Based Marketing To Show Your (Unique) Expertise

Traditional financial advisor marketing was all about prospecting and selling. From cold-calling to cold-knocking to networking meetings, the ‘Game of Numbers’ was to get through as many “No’s” as it takes to get to the next prospect who says “Yes” and buys the product.

But selling advice is fundamentally different than selling a product. Prospects need to believe that you have the knowledge and skills to solve their problems before they’re willing to hire. Which means it’s essential first and foremost to showcase your expertise and demonstrate your credibility.

At the Kitces Marketing Summit, you’ll have a chance to see what successful financial advisors are doing to market their expertise by using that expertise to educate their prospects and attract their ideal clients. From leveraging audio, video and written channels, you’ll get a unique behind-the-scenes look at real financial advisors’ efforts to engage in education-based marketing.

Agenda

Expert guests will take you behind the scenes with real-world examples of what advisors can do to market their expertise to prospects and clients.



Choosing A Content Medium That's Authentic To YOU

Michael Kitces, MSFS, MTAX, CFP®, CLU, ChFC, RHU, REBC, CASL
Founder & Chief Financial Planning Nerd, Kitces.com



Choosing A Content Medium That's Authentic To YOU

Taylor Schulte, CFP®
Founder, Define Financial



Turning A Podcast Into Real Revenue

Casey Weade, CFP®, RICP, CLU, ChFC, IAR
CEO & Founder, Howard Bailey Financial



Accelerating Growth By Guesting On Other Podcasts

Anna N'Jie-Konte, CFP®, MBA
Founder, Dare to Dream Financial Planning



Attracting Prospects With Hyper-Targeted Webinars

Tushar Kumar, ChFC, CLU
Founder, Twin Peaks Wealth Advisors



Getting Paid To Market With Educational Workshops

Pamela Capalad, CFP®, AFC
Founder, Brunch & Budget



Showing Your Ongoing Value In the Annual Review Meeting

Isaac Presley, CFA
CEO, Cordant Wealth Partners



Maximizing Your Growth By Repurposing Your Existing Content

Justin Goodbread, CFP®, CEPA, CVGA
Founder, Heritage Investors



Michael Kitces

Choosing A Content Medium
That's Authentic To YOU

Session Notes



Michael Kitces

Choosing A Content Medium
That's Authentic To YOU

Key Takeaways From This Session

Create Results - Actionable Ideas

Idea:

Why It's Important:

Action Step:



Taylor Schulte

Choosing A Content Medium
That's Authentic To YOU

Session Notes



Taylor Schulte

Choosing A Content Medium
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Key Takeaways From This Session

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Action Step:



Casey Weade

Turning A Podcast Into Real Revenue

Session Notes



Casey Weade

Turning A Podcast Into Real Revenue

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Why It's Important:

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Anna N'Jie-Konte

Accelerating Growth By
Guesting On Other Podcasts

Session Notes



Anna N'Jie-Konte

Accelerating Growth By
Guesting On Other Podcasts

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Tushar Kumar

Attracting Prospects With
Hyper-Targeted Webinars

Session Notes



Tushar Kumar

Attracting Prospects With
Hyper-Targeted Webinars

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Pamela Capalad

Getting Paid To Market With
Educational Workshops

Session Notes



Pamela Capalad

Getting Paid To Market With
Educational Workshops

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Isaac Presley

Turning Written Expertise Into
Inbound Organic Leads

Session Notes



Isaac Presley

Turning Written Expertise Into
Inbound Organic Leads

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Justin Goodbread

Maximizing Your Growth By
Repurposing Your Existing Content

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Justin Goodbread

Maximizing Your Growth By
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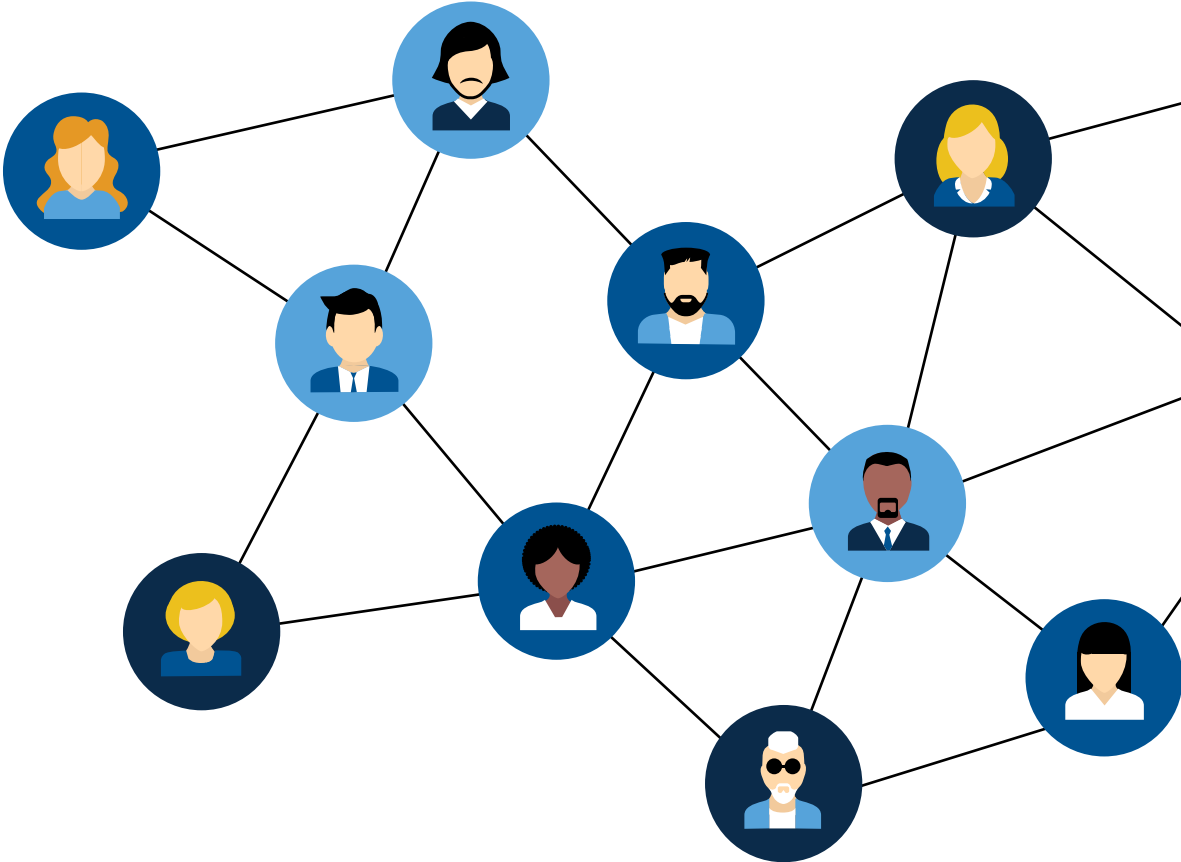
Idea:

Why It's Important:

Action Step:

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. You'll also have the opportunity to collaborate with fellow advisors, discuss your plan of action, and (maybe) find yourself an accountability partner!



Closing

Thank you for joining us for the Kitces Marketing Summit! We're so glad you spent time with us going behind the scenes of successful strategies for communicating expertise, 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 to 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 possibilities that can help you!

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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