KITCES SUMMIT

KITCES MARKETING SUMMIT

Common Advisor Marketing Tactics...

Done Uncommonly Well

Thursday, April 27, 2023

In this workbook

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.

See How Successful Advisors Are Marketing Their Financial Planning Services

Instead of telling you what you 'should' be doing as an advisor, our Kitces Summit guests are all practicing financial advisors who will actually show you what actions they've taken to market their expertise to clients and prospects, so you can see what's really possible for yourself.

At the Kitces Marketing Summit, you'll have a chance to see what common advisor marketing tactics looks like when they are done uncommonly well with unique behind-the-scenes looks at real financial advisors' strategies that attract clients.

No vendors. No sponsors. Just a series of 30-minute real conversations between our co-hosts – Michael Kitces and Taylor Schulte – and our expert guests, financial advisors who will screenshare their actual marketing deliverables and show how they communicate their value to prospects and clients.

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.

How To Execute Common Advisor Marketing Tactics Uncommonly Well

Michael Kitces
Founder & Chief Financial Planning Nerd, Kitces.com

How To Execute Common Advisor Marketing Tactics Uncommonly Well

Taylor Schulte, CFP®
Founder, Define Financial

Teaching Paid In-Person Financial Education Community College Classes

Ryan R Morrissey, CFP®, CLU®, ChFC®, CMFC®
Wealth Advisor & Principal, Morrissey Wealth Management

Hosting Free In-Person Educational Workshops in the Local Community

Kristen Hull, CRPC®
Strategic Planning Analyst, Duncan Financial Group

Converting $50K of SmartAdvisor Leads Into $100K of HNW Clients With a Systematic Sales & Drip Marketing Process

Michael Collins, CFA
Founder & CEO, WinCap Financial

Converting the Best HNW Webinar Attendees Into Clients With Targeted Account-Based Marketing

Ashley Murphy, GFP (USA), CFP®, AIF®
Founder & Principal, Arete Wealth Strategies Australia

Generating More COI Referrals by Distributing Tax Season Survival Kits & Cultivating Relationships

Aleia K MacDonald, CFP®
Owner, Advanced Wealth Strategies

Increasing Referrals by Asking Three Powerful Questions of Every Client & COI

Veronica Karas , CFP®
Senior Financial Advisor, CAPTRUST

Michael Kitces & Taylor Schulte

How To Execute Common Advisor Marketing Tactics Uncommonly Well

Session Notes

Michael Kitces & Taylor Schulte

How To Execute Common Advisor Marketing Tactics Uncommonly Well

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?

Ryan R Morrissey

Teaching Paid In-Personal Financial Education Community College Classes

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Ryan R Morrissey

Teaching Paid In-Personal Financial Education Community College Classes

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Kristen Hull

Hosting Free In-Person Educational Workshops in the Local Community

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Michael Collins

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Ashley Murphy

Converting the Best NHW Webinar Attendees Into Clients With Targeted Account-Based Marketing

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Aleia K MacDonald

Generating More COI Referrals by Distributing Tax Season Survival Kits & Cultivating Relationships

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Veronica Karas

Increasing Referrals by Asking Three Powerful Questions of Every Client & COI

Session Notes

Veronica Karas

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