

# Tech Resources



## Yohance Harrison

Money Script Wealth Management

*Identifying Referral “Kings and Queens”  
to Accelerate Client Referrals*



## Lauren Oschman

Vestia Wealth Advisors

*Restructuring the Close of  
Every Client Meeting to Encourage  
More Client Referrals*



## Tim Goodwin

Goodwin Investment Advisory

*Getting More Local Clients  
With Systematized Processes to  
Collect Client Google Reviews*



# Tech Resources



**Matt Hylland**

Arnold & Mote Wealth Management

*Growing an Email List That Actually Converts to New Clients*



**Dave Zoller**

Streamline Financial Services

*Creating Templated Video Content to Build Your Brand Awareness*



**Nate Hoskin**

Hoskin Capital

*Creating a Consistent Prospect Pipeline in Under 3 Hours/Week Using Short-Form Videos*

