

Tech Resources



David Sandhu

EverSource Wealth Advisors

Using LinkedIn Navigator To Fill Educational Webinars With (Cold) Prospects



Tim Goodwin

Goodwin Investment Advisory

Building An Automated 6-Step Email Series That Converts Digital Prospects To Become Ongoing Clients



Tech Resources



Josh Ross

Energized Retirement Planners

Leading In-Person Educational Workshops That Consistently Attract High-Quality Prospects



Libby Greiwe

The Efficient Advisor

Running Client-Hosted Referral Events To Authentically Attract New Long-Term Relationships



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