

# KITCES SUMMIT

**Welcome, Advicers!**

# Meet Your Summit Hosts



**Michael Kitces**  
Kitces.com



**Taylor Schulte**  
Define Financial



# Housekeeping Notes

# Agenda



## Education

12:00 Welcome & Housekeeping

12:05 Trust-Building Tactics To Attract And Win More Prospective Clients

12:25 Educational Webinars w/ David Sandhu

1:00 Educational Workshops w/ Josh Ross

**1:30 Break**



## Nurture

1:40 Email Sequences w/ Tim Goodwin

2:15 Referral Thank You Notes w/ Adam Chapman

**2:45 Break**



## Referrals

2:55 Client-Hosted Referral Events w/ Libby Greiwe

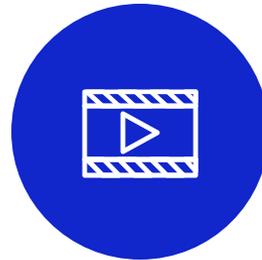
3:30 COI Referrals w/ Tiffany Charles



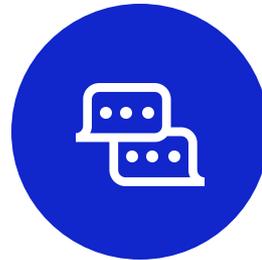
# **Download the Attendee Workbook in the Handouts tab**



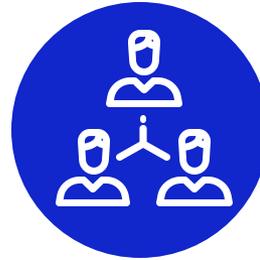
**Access handouts  
provided by the guests  
in the Handouts tab**



**A recording is included with your registration and will be available by tomorrow evening.**



**Use the Chat tab to share thoughts and ask questions**



# Post-Summit Community Conversation

Make a connection.  
Process what you've learned.

# Shoutout to the Kitces Summit Adviser Ambassadors!

**Adam Chapman**, YESmoney

**Amy Rosenow**, Bold Vision Financial

**Chitra Patel**, WealthWorth

**Chris Chen**, Insight Financial Strategists

**David Wiedmeyer**, KLD Wealth Management

**Jason Pereira**, Woodgate Financial

**Julie Betoni**, Ignite Financial

**Justin Peek**, PEEK WEALTH

**Phil Weiss**, Apprise Wealth Management

**Sally Boyle**, SJ Boyle Wealth Planning

**Scott Sather**, Awaken Wealth Management

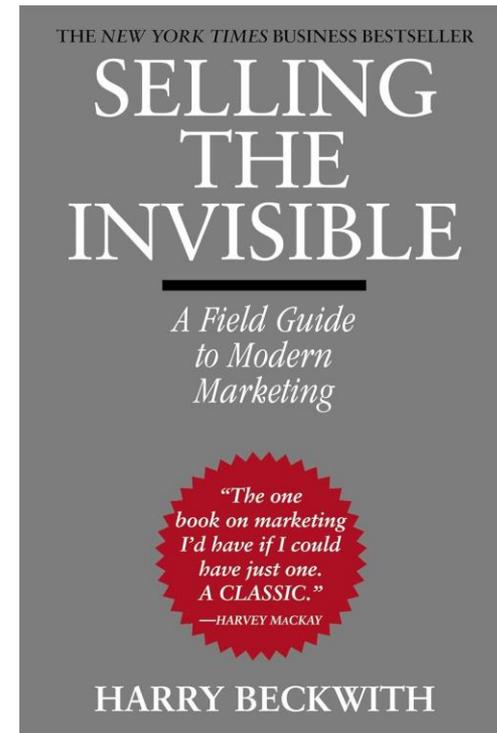


# What are we doing here?

# Finding A Financial Advisor Is Hard...

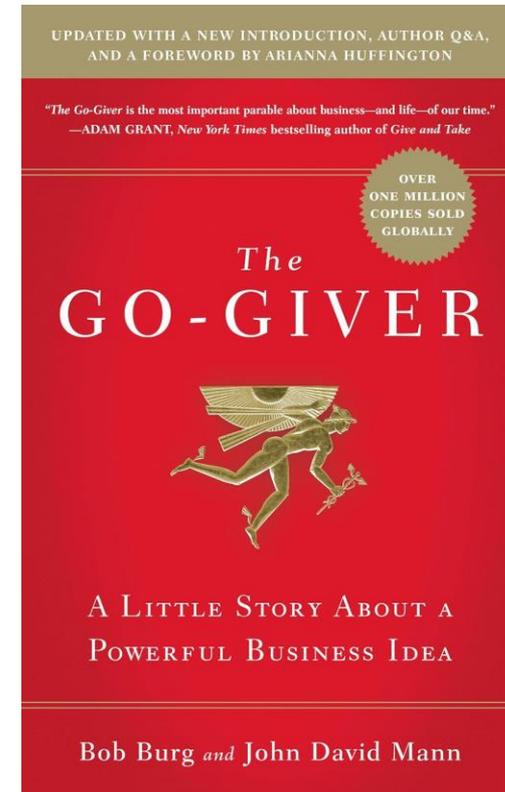
When your service isn't tangible, people look to the intangibles for 'clues'.

No one can evaluate the expertise of an expert, so they evaluate the relationship and the connection they feel.



# What Does It Take To Get A New Client?

"All things being equal, people will do business with a refer business to, those people they know, like and **trust**"



# How Do You Establish Trust?

Source	Existing Client	Trusted Source	Got To Know Them	Saw Their Expertise	Serendipitous Discovery
<b>Marketing Tactic</b>	Client Referral	COI, Solicitors, Third-Party Reviews, Find-An-Advisor Platforms	Networking, Events, Social Media, Video, Podcasts, Radio, Seminars, Webinars	Blog, Newsletter, Book, Media Appearances	SEO, Advertising, Direct Mail, Cold-Calling/Cold-Knocking
<b>Trust statement</b>	<i>"My brother worked with her, says she's good"</i>	<i>"My accountant has vetted her, says she's good"</i>	<i>"I've met/heard her, feels like she'd be good"</i>	<i>"I've seen her stuff, she seems like an expert"</i>	<i>"I've had this problem, discovered someone who might help"</i>



**What is the primary way you establish trust?**

THE  
**STAYWEALTHY**  
Retirement  
Show

WITH  
**Taylor  
Schulte** CFP®



The Stay Wealthy Podcast  
with Taylor Schulte

Learn how to reduce taxes, invest smarter, and make work optional in retirement.

Subscribe Now ▼



## How I Nearly Lost \$90,000 Buying My First Home (Ep. 14)

“

*"As some know, the last four years have been a roller coaster for my family. We poured our life savings into our first home, **and things didn't quite go as planned.**"*

*The good news? It was just money. And it was just a house. It could have been much worse, and we reminded ourselves of that every day."*



## Three Things More Important Than 529 Accounts (Ep. 33)

“

*If you can't hear it in my voice, it's currently **about 5:30am**. I'm at home having my first of many cups of coffee for the day. And get ready for this. **My wife and I are having a baby today!***

*If all goes as planned, in just a few hours, we will be checking into the hospital and they're going to start the induction process. So, yes, big day for me over here. And I just, I don't know, I just felt inspired to get up early and start my day by recording this podcast. This is baby number two for us, **it's a boy** and we are really excited.*



## The Biggest Risk (Ep. 182)

“

*I've been on skis since I was about two years old.*

*And in my teens, **my dad and I started taking annual ski trips together.** We've missed a year here and there, but it's still very much a tradition that's alive and well.*

*In fact, I just returned from our **recent trip to Sun Valley, Idaho,** and side note, if you've never been to Sun Valley, I highly recommend it. The food, the people, the landscape, the history, that airport tucked between the mountain ranges, it's just such a special place.*

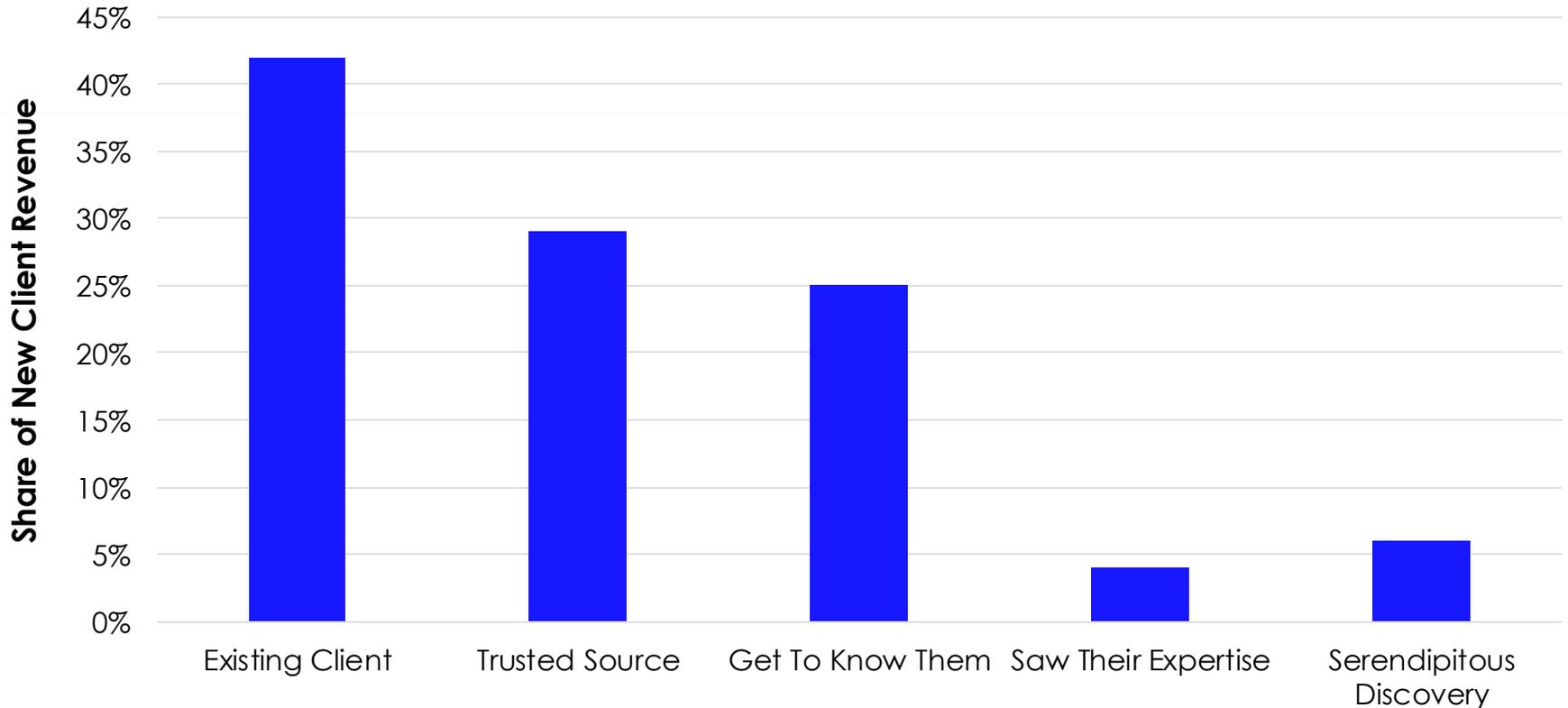
# Stay Wealthy Retirement Show

Monthly Downloads (2017 – 2025)



# Where Do Clients Really Come From?

New Client Revenue By Clients' Advisor Search Approach

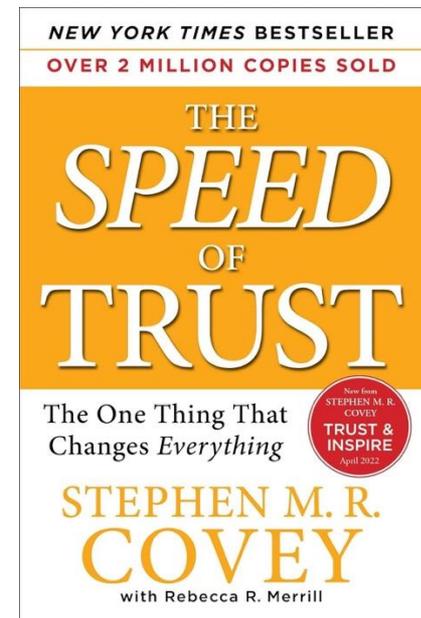


# Nurturing Trust Over Time

- Even when prospects start with discovery and expertise...
- “All else being equal, people do business with people they know, like, and trust”

# How Do You Accelerate The Speed Of Trust?

Trust			
Character		Competence	
Integrity	Intent	Capability	Results





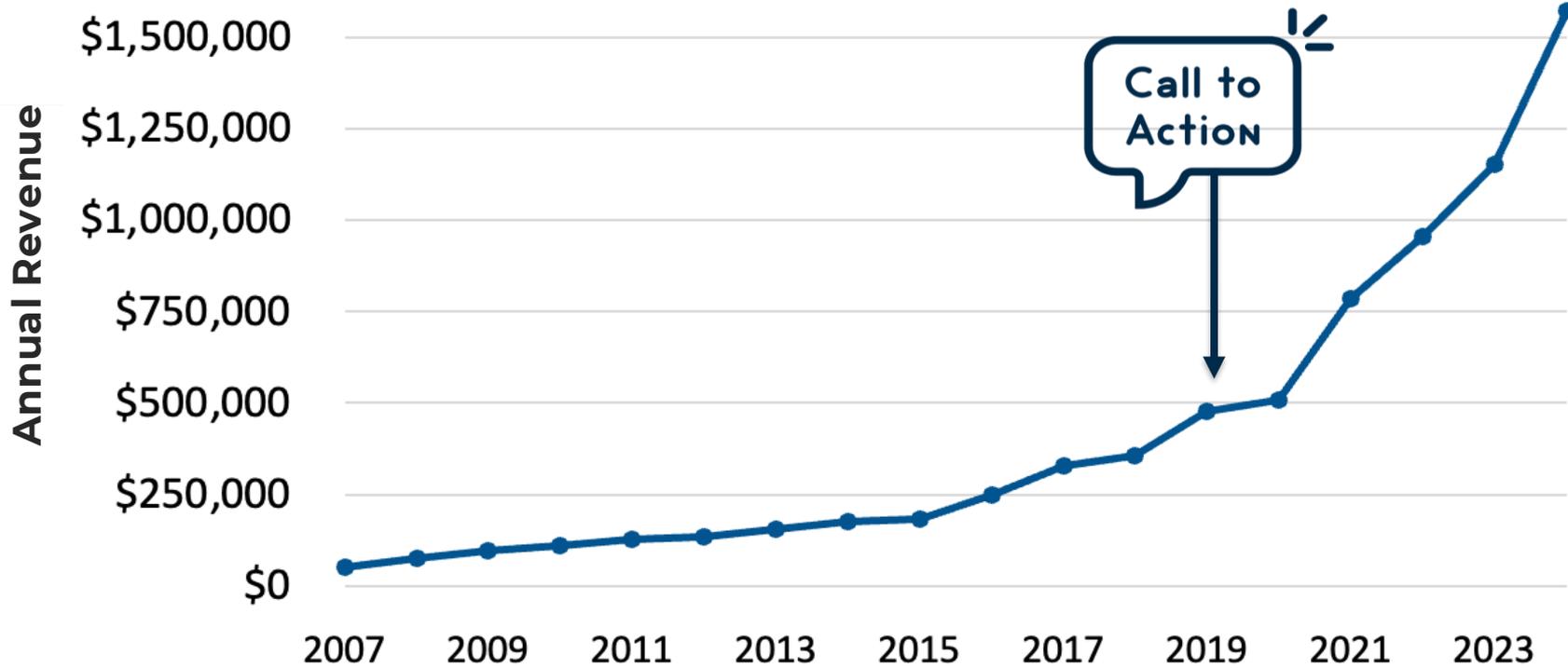
# Trust

- Media/Interviews
- Guides & Checklists
- Weekly Email Newsletter
- More Than Money (Book)
- Video

- Website – Services, Case Studies
- Client Testimonials
- Free Retirement Assessment



# DEFINE FINANCIAL





**How effective is your  
process to nurture prospects  
to build trust with them over  
time?**

**How can you  
establish & nurture trust?**

**...so, prospects can more readily  
know, like, and *trust* you?**

**What best aligns to your  
natural gifts and style?**

**David Sandhu**  
Using LinkedIn Navigator To  
Fill Educational Webinars



**Josh Ross**  
Leading In-Person  
Educational Workshops  
That Consistently Attract  
Prospects

**Education**

**Tim Goodwin**  
Building An Automated 6-  
Step Email Series That  
Converts Digital Prospects  
Into Ongoing Clients



**Adam Chapman**  
Developing An Unconventional  
Thank-You Note Strategy To  
Generate COI Referrals

**Nurture**

**Libby Greiwe**  
Running Client-Hosted  
Referral Events To Attract  
New Relationships



**Tiffany Charles**  
Implementing A 3-Meeting  
Relationship-Building Process  
With New COIs

**Referrals**



Thanks for joining us!

**Let's Get Started!**

