

KITCES MARKETING SUMMIT

Common Advisor Marketing Tactics...

Done Uncommonly Well

Thursday, April 24, 2025

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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 strategies 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 themselves to prospects and clients.



Trust-Building Tactics To Attract And Win More Prospective Clients

Michael Kitces

Founder & Chief Financial Planning Nerd, Kitces.com



Trust-Building Tactics To Attract And Win More Prospective Clients

Taylor Schulte, CFP®

Founder, Define Financial



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

David Sandhu, CRPC

Senior Financial Advisor, EverSource Wealth Advisors



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

Josh Ross, MBA, EA

Founder, Energized Retirement Planners



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

Tim Goodwin, CFP®

Founder & Senior Wealth Advisor, Goodwin Investment Advisory



Developing An Unconventional Thank-You Note Strategy To Generate More Referrals From COIs

Adam Chapman

Founder, YESmoney



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

Libby Greiwe

Founder & CEO, The Efficient Advisor



Implementing A 3-Meeting Relationship-Building Process With New COIs To Start A Steady Stream Of COI Referrals

Tiffany Charles

Chief Growth Office & Partner, Destiny Capital & Entrepreneur Aligned



Michael Kitces & Taylor Schulte

Trust-Building Tactics To Attract
And Win More Prospective Clients

Session Notes



Michael Kitces & Taylor Schulte

Trust-Building Tactics To Attract
And Win More Prospective Clients

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?



David Sandhu

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

Session Notes



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Josh Ross

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

Session Notes



Josh Ross

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Tim Goodwin

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

Session Notes



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Adam Chapman

Developing An Unconventional Thank-You Note Strategy To Generate More Referrals From COIs

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Libby Greiwe

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

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Tiffany Charles

Implementing A 3-Meeting Relationship-Building Process With New COIs To Start A Steady Stream Of COI Referrals

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