

Converting with confidence

To convert potential clients, it's important to clearly communicate why they need the service you provide, and why you're the best person to provide them with that service through your value proposition. This worksheet provides prompts to guide you in positioning your financial practice for clients and emphasize your value proposition.

Enhance Your Elevator Pitch

When your time in front of potential clients is limited, your elevator pitch is an essential tool to effectively communicate your value proposition and set yourself apart from competitors. Consider adding or updating the following elements to build credibility with potential clients.

CREDENTIALS

INCLUDING:	FOR EXAMPLE:	YOUR CREDENTIALS:
<ul style="list-style-type: none"> - Education - Licenses - Certifications 	Bachelor of Science in Business Life and Health Insurance Licenses Chartered Financial Analyst®	

COMPETENCE

INCLUDING:	FOR EXAMPLE:	YOUR COMPETENCE:
<ul style="list-style-type: none"> - Measurable Achievements - Strengths - Areas of focus/expertise 	Assets under management Financial coaching Retirement planning	

CHARACTER

INCLUDING:	FOR EXAMPLE:	YOUR CHARACTER:
<ul style="list-style-type: none"> - Family - Hobbies/Interests - Community Involvement 	Spouse, kids Knitting, golfing Member of a service society	

CALL TO ACTION

INCLUDING:	FOR EXAMPLE:	YOUR CALL TO ACTION:
<ul style="list-style-type: none"> - Services - Next steps - Contact information 	Free consultation Fill out a form Here's my card	

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Here's how someone might approach their elevator pitch:

“

After earning my bachelor's degree in finance from the University of Cincinnati, I started my career with an advisory firm. During my time there, I had the opportunity to earn my Series 7, Series 66, Life and Health Insurance licenses.

After a few years, I decided to become a Certified Financial Planner® and open my own financial advising practice. Throughout my time as a financial advisor, I have had the pleasure of working primarily with long-term clients seeking holistic financial advising as they prepare for retirement and beyond. I currently manage over \$150 million in assets for just under 50 households and often work with multiple generations of the same family.

Outside of my professional life, I enjoy spending time with friends and family, knitting and volunteering as a referee for high school soccer games. Would you like to schedule a free consultation so we can dive into more about the services I offer and what financial advising can do for you?

”

Practice writing your own elevator speech:

The STAR Method

The STAR method is a structured way of storytelling that may be useful in sharing concrete examples of past success with clients. Unlike simply mentioning your qualifications, the STAR method offers the opportunity for you to demonstrate soft skills, provide evidence of success and address potential client concerns.

Situation/ Task	Quickly explain the situation and identify what your responsibility/role was.	My client was concerned that her pension benefits will not provide enough retirement income.
Action	Share what actions you took, highlighting information that may be relevant to that potential client.	I assessed her current financial situation and presented three potential solutions.
Result	Explain how the issue was successfully resolved.	The client purchased a fixed-indexed annuity with a guaranteed income rider, ensuring she will have enough money in retirement to maintain her current lifestyle.

Practice using the STAR method:

Situation/ Task	
Action	
Result	

Situation/ Task	
Action	
Result	

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