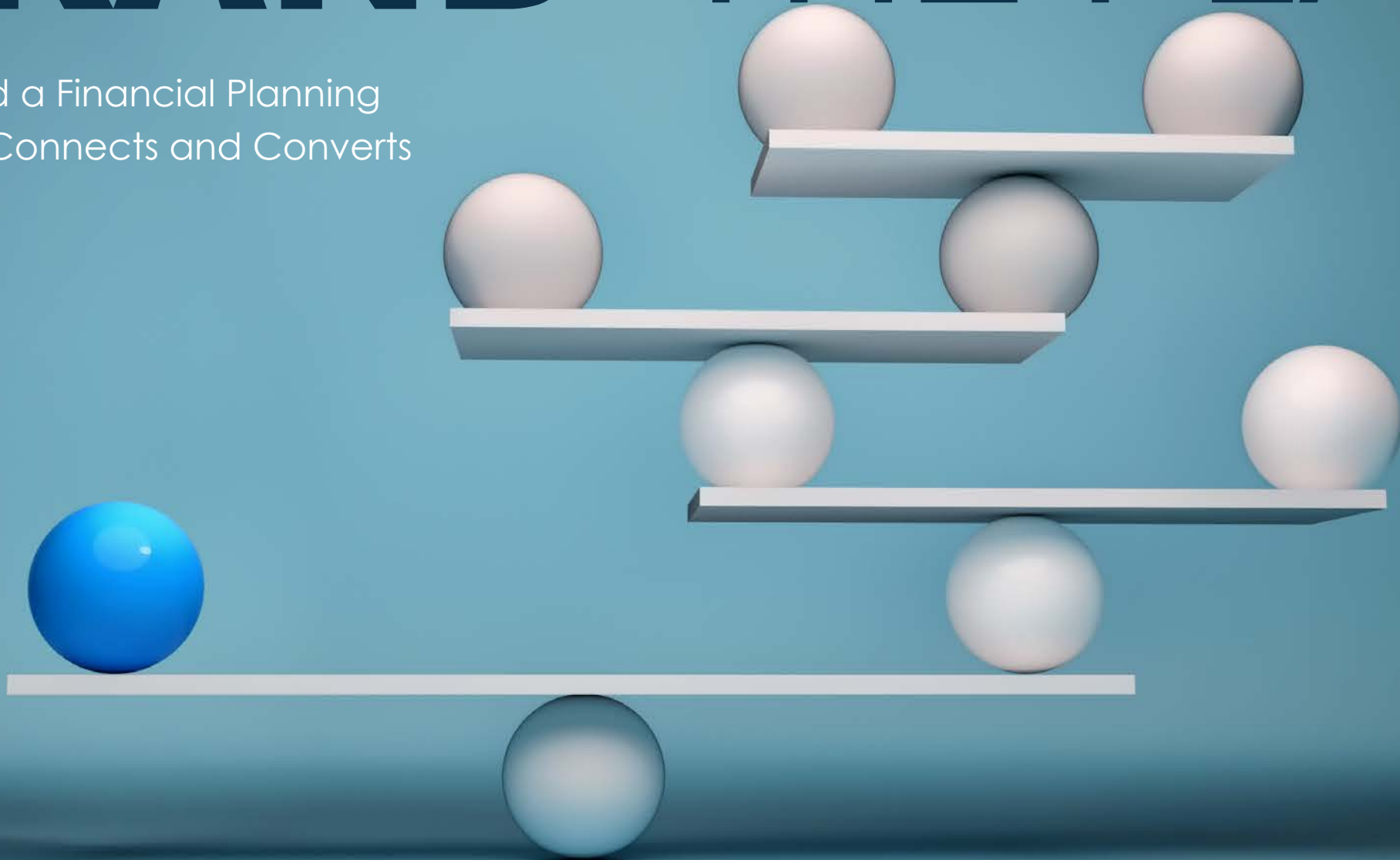


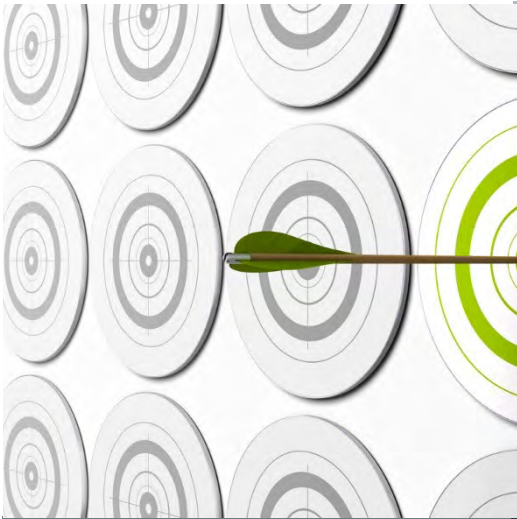
BRAND THE PLAN

How to Build a Financial Planning
Process that Connects and Converts



SHIFTS IN OUR PROFESSION

5 Reasons Planning is on the Rise



02

Technology

Tech-based innovation is setting the new standard.



04

Identity Crisis

Most advisors identify themselves as planners, while analysis of firms often shows they are not.



01

Goals-Based Advice

Advisors are realizing the power of reporting progress to goals vs investment benchmarks



03

Reframing Value

Advisors' value propositions are being reframed in light of today's competition.



05

Rising Expectations

Consumers now expect a personalized relationship and exceptional service at every level.



DO ALL ADVISORS SAY THE SAME THING?

HNW INVESTORS THINK SO

16%

**STRONGLY
AGREE**

44%

AGREE

29%

DISAGREE

11%

**STRONGLY
DISAGREE**



So how do you
differentiate your
firm through
planning?



BRAND THE PLAN

KEYS TO THE ART OF BRANDING THE PLAN



2



CARSON
COACHING

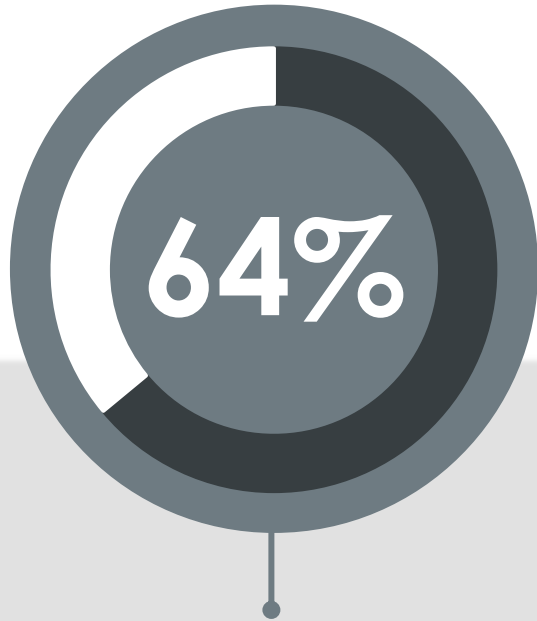
YOUR MESSAGE **MUST BE**
COMPELLING



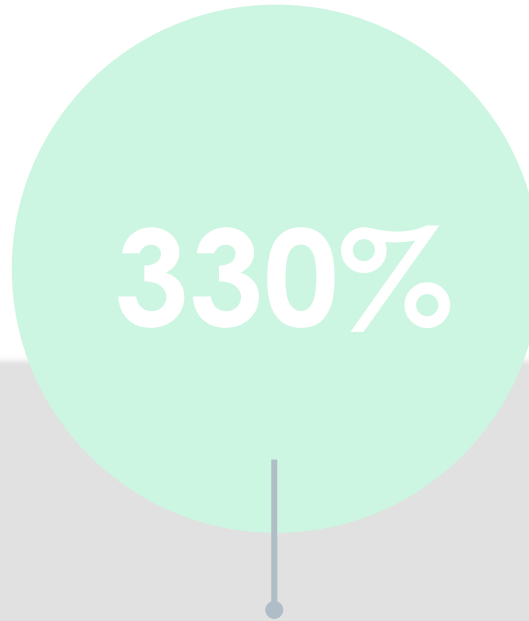
Ingredient #1



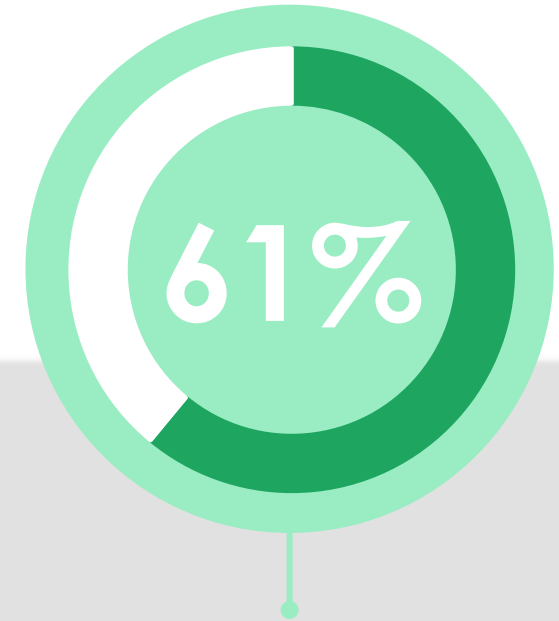
Sometimes Simple Is Savvy



64% of consumers are willing to pay **more** for simpler experiences.



A stock portfolio of the **simplest global brands** outperforms the major indexes by 330%.



61% of consumers are more likely to recommend a brand because **it's simple**.



89%

THE VAST MAJORITY OF BUSINESSES
WILL COMPETE **MAINLY ON THE CLIENT
EXPERIENCE** OVER THE NEXT DECADE.



Gartner 2015

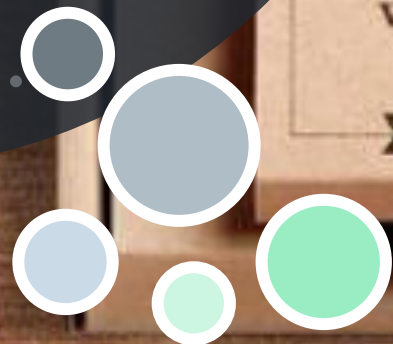


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COACHING

YOUR BRAND MUST BE
AUTHENTIC



Ingredient #2



A man with glasses and a dark zip-up jacket is speaking on a stage. He is gesturing with his hands. The background is orange with yellow bokeh lights.

*“People don't buy **what**
you do; they buy **why** you
do it.*

*And what you do simply
proves what you believe.”*

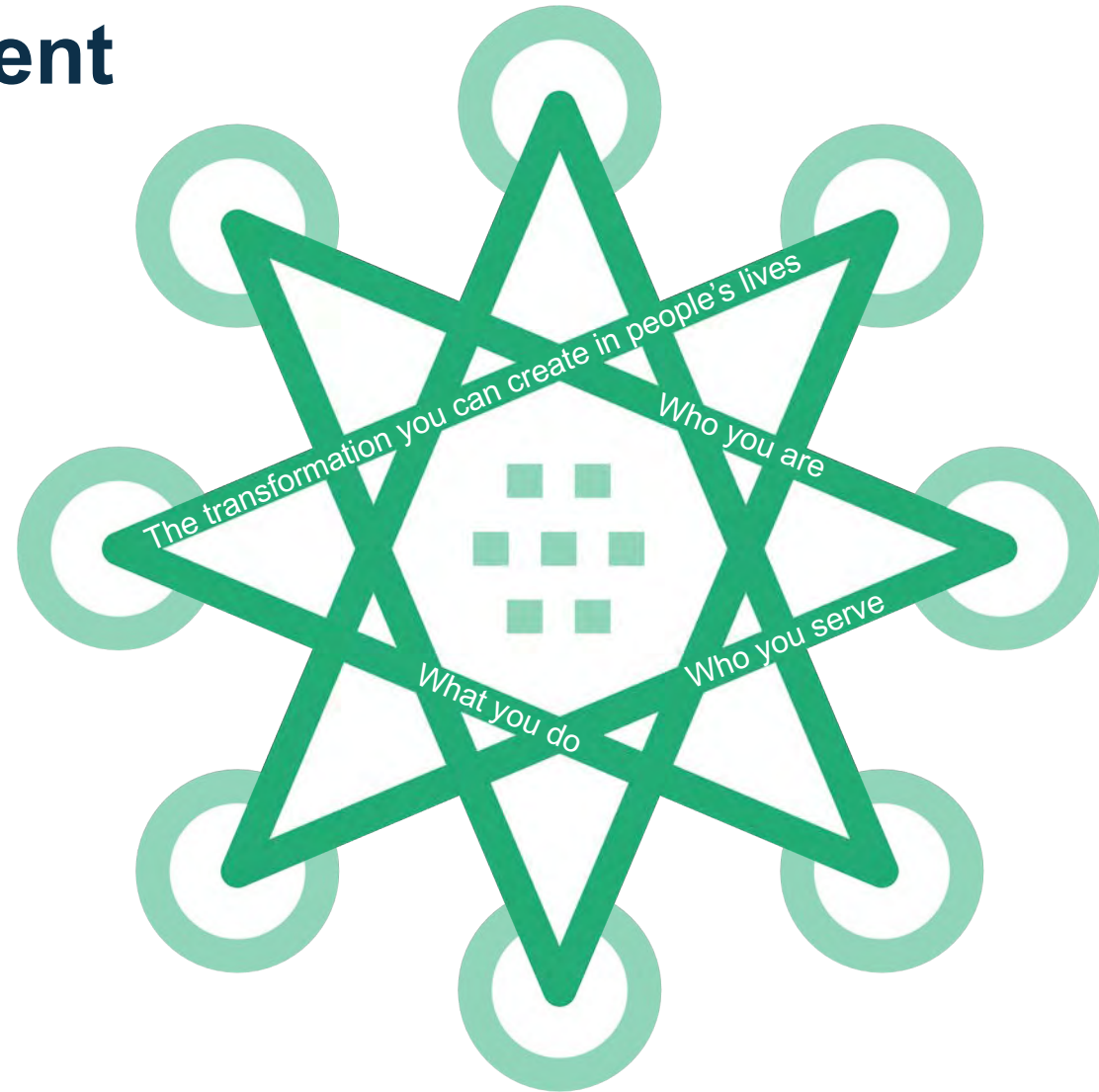


Simon Sinek



Create a Mission Statement

Defines why you exist



| Carson Wealth

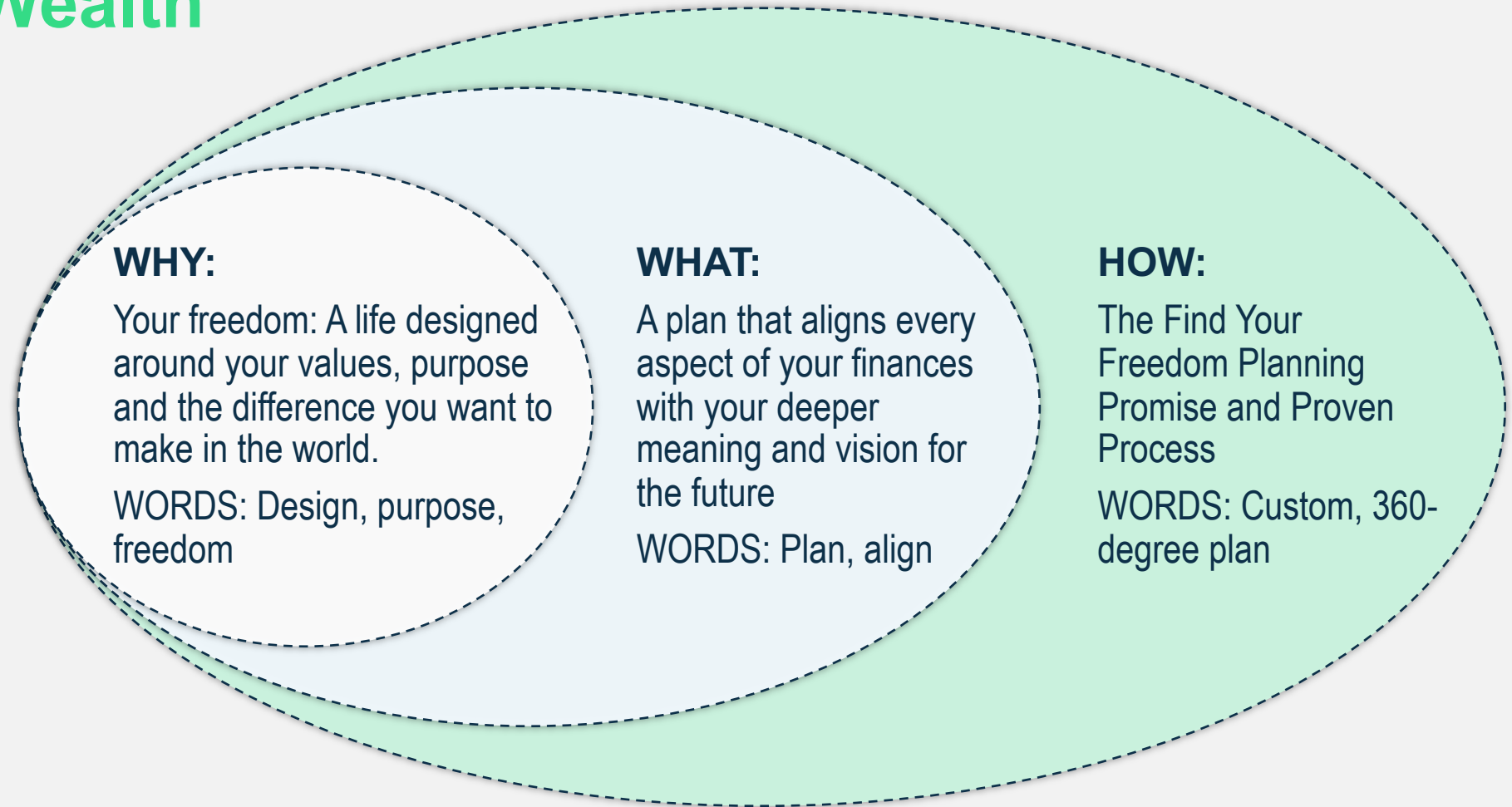
You define freedom.
**We'll design the path to
help get you there.**

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CARSON
COACHING

| Carson Wealth



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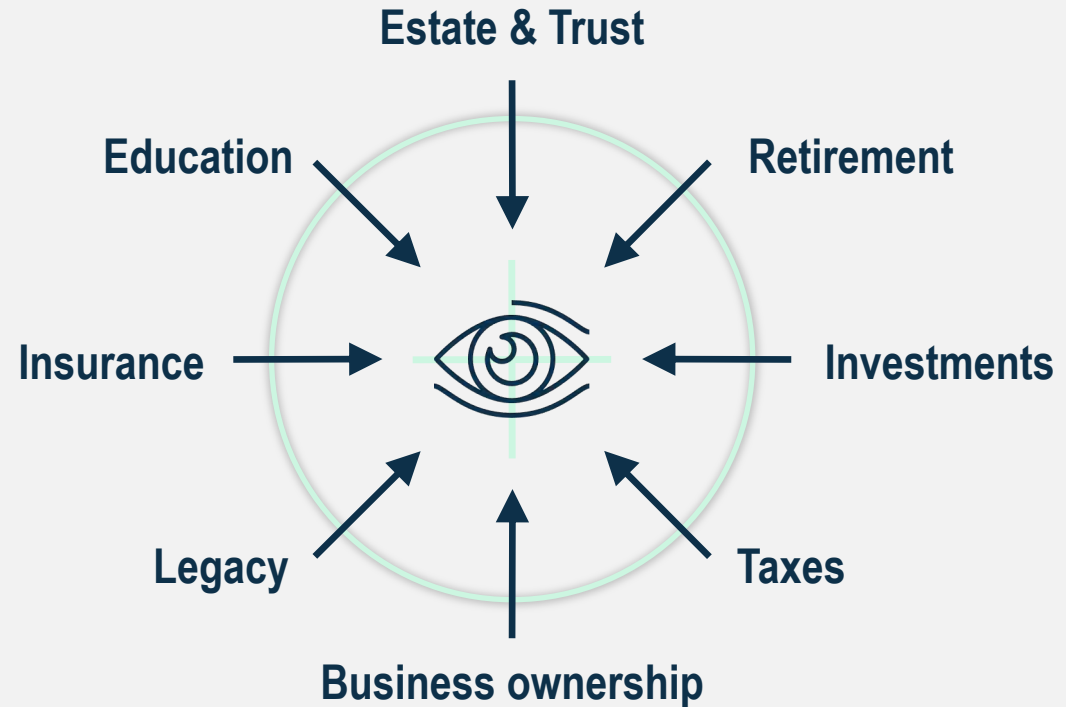
| Supporting points

- We start with your unique vision of financial freedom
- Our Find Your Freedom Planning Promise covers every facet of your financial picture
- A custom, you-focused financial plan in plain English
- Proven Process to ensure you're always on track, no matter what changes come your way
- Serving more than 47,000 families nationwide

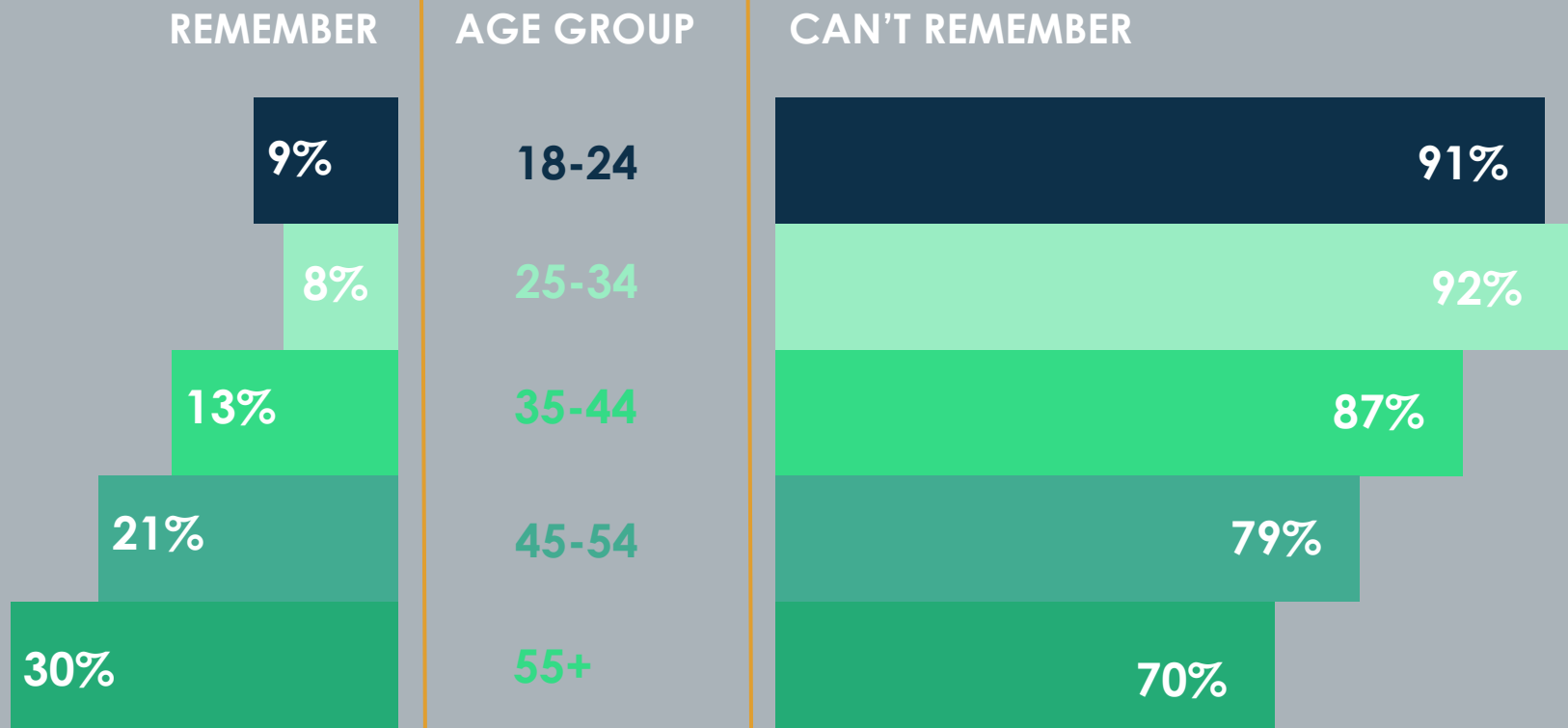


Supporting points

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Can you
give an
example of a
memorable
story told by
a business?



8 out of 10 people want brands to tell stories...

But 85% can't remember a good one.



Headstream 2015

Authenticity is more than
speaking; Authenticity is also about
doing. Every decision we make
says something about who we are.

Simon Sinek

“ quote fancy



SPEAK TO YOUR CLIENTS IN THEIR LANGUAGE

STORAGE FOR 1GB OF MP3's VS
1,000 SONGS IN YOUR POCKET



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ANALYSIS

INTUITION

LOGIC

FEELINGS

FACTS

CREATIVITY

SEQUENCING

IMAGINATION

EMOTION

LOGIC

AWARENESS

BE PRESENT

INTEREST

BE RELEVANT

EVALUATION

BE PROVEN

TRIAL

BE HELPFUL

ADOPTION

BE FRIENDLY



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87%

Say they want
"meaningful relationships"
with brands.

66%

Say brands don't share
one with them at all.



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Communicate Your Value and Your Purpose



Connecting Wealth with Purpose



Life Map



Aligning Life and Wealth



True Wealth



Live Well



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The Two

E's

1

EDUCATE

Your clients love you but don't know why

Value

Educate on the quality of your planning process and how it provides great value so they want to discuss it with others.

Process

A clean, concise process that is branded with a tagline makes it easier for your clients to talk to others about you.

THE PERFECT Investment Management Process



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The Two

E's

2

EXPECTATIONS

They know they love you – now what?

Know & Tell Your Story

Define your value proposition, explore avenues to spread your brand story, and keep it simple and repeatable.

Make Introductions

Encourage clients to become brand ambassadors of your firm, because they know your story better than anyone else.

Align Plan Type with Needs



Holistic



Comprehensive



Modular

Different types of plans have varying degrees of warmth and depth

PEOPLE BEHIND THE PLAN



Financial Planner & Client
Relationship Manager



Roles



Compensation



Where to Find



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Financial
planning has
quickly become
the value hub of
every advisory
business



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TAKEAWAYS

1. Document and polish your compelling, authentic story to differentiate your planning process.
2. Leverage financial planning to generating referrals and organic growth.
3. Planning is a process – in that process you are the behavioral coach.

