

Webinar Script – Transcript

Alright, so thank you for joining this webinar today – today’s topic is how you as an Investment or Financial Advisor get \$10 million dollars in new assets in 10 months or less, WITHOUT spending any big marketing dollars.

So this webinar is PACKED with information. By the end of this webinar you are going to know how to bring in at least \$10 in new AUM in 10 months or less, with NO marketing spend, recognize that the trend to acquire clients online is REAL. This is the first time in history where you can acquire clients all across the country on a national scale!

The truth is now is the time to make your practice have an online presence because clients are online. But no one knows how to do it properly. Clients are out there looking for financial advice. But Financial Advisors are not professional online marketers.

Your new clients are not wooed by big names in financial services. You as financial advisors need more relevant scaling tactics today

So let’s get right to it. The reality is that all financial professionals need 4 things to have a successful business: Sales, Marketing, Finance, and Operations. Out of these Sales and Marketing drive the other two.

Traditionally, client acquisition via sales and marketing channels that advisors use today are seminars, cold calling and relying on referrals / networking but the fact is that we’re in 2020, the entire world has gone digital and these traditional methods have left financial advisors like yourself feeling frustrated and spinning your wheels. You ask why? Because 80% of your time is going to mundane admin works such as trying to get in front of people where as only 20% of your time is going

towards what you're actually good at – sitting down face to face with a client closing business and serving your clients.

Now, to attempt to solve this maybe you may have hired a marketing person, agency, hosted an expensive seminars or doubled down on methods that worked before to fix this problem only to find that the problem remains and you spent a pretty penny with nothing to show.

This is very common and most advisors are in the same boat, and there is no need to feel intimidated or anxious by new technology because you don't know where to start.

The truth is that if you want a steady flow of qualified business that turn into clients, follow the steps that I'll share with you today and at least, AT least you will have a game plan of a predictable and consistent way of bringing in new clients and continuing to serve them instead of failing at marketing and sales.

And we have the case studies to back up what I'll be showing you today.

Here's a testimonial from Jake Stoneburner. Jake's an ex-NFL athlete turned advisor. He joined his dad's business who built the business from ground up the hard way – cold calling, door knocking hustling for business. Before coming across Fortuna, Jake didn't really have a client acquisition strategy as he just relied on referrals.

Jake brought in \$3 million in new AUM and has 54 additional households in his pipeline with at least \$250K plus per household who will eventually do business with him. This is in less than 8 months of working leveraging Fortuna's tools. Jake's dad's words to him were “only if I had access to this stuff when I was building my business”

Here's Mike Miele from Belpoint Asset Management out of Boston. Mike has seen a drastic uptick in the awareness and exposure his practice has received by implementing these digital tools. He has been able to target the exact people he wants to work with, and has a consistently fully booked calendar.

Now he saves 40 hours a month trying to prospect, his pipeline is consistently full and he's happily meeting with high quality leads monthly. Mike says that it's saved him literally hundred of hours of work easily!!

Here is another example of someone seeing great results from using the strategies I am about to share with you. Jon has been worked with us for over a year, and through our strategies and system, he had over 200 new meetings in 2019. This is not even the best part, Jon has actually been able to build his sales pipeline to over \$13million dollars. Yes you heard that right \$13 million dollars JUST using digital client acquisition methods which I'm about to get into in just a minute.

And we've worked with TONS of other clients from JP Morgan

Northwestern Mutual

Raymond James

Merrill Lynch

RBC

BMO

And many many more

Using these digital strategies, you'll be able to get rid of expensive marketing retainers, cold calling or traditional methods of getting new business and instead focus on year over year growth, that's it!!

I do want to touch on who this webinar is designed for. This list is front of you is quite exhaustive but I will specify that these strategies that I'm about to share are designed for advisors who want to get to the next level and accelerate their growth.

We are looking for advisors who want to grow fast by ATLEAST \$10M in new AUM this year, and have a predictable way to get in front of current and prospective clients.

And to back that up further we did some research in terms of who fits best. This research included 406 advisors – who have a book of \$10M in AUM or more and what we found is that that they were spending at least \$5000 dollars on marketing annually, whether that's dinners, mailers seminars some sort of entertainment valued at \$5,000 or more annually to aggressively add new clients in building their business further

Now quickly before I dive into these methods just a little quick intro about myself. My name is Omer Jamal and I'm the CEO/Founder here at Fortuna.ai

Prior to this I was a wholesaler at CIBC Asset Management top 5 Canadian Bank and spoke to 1000s of advisors who shared a common concern – how do we get more assets! We understand this space really really well and our knowledge comes speaking to advisors like yourself and marketing experts who are absolutely crushing it online with 7 – 8 figure digital only businesses.

We were established in 2017, we've worked with over 400 advisors to date in 4 different continents cumulatively helped advisors grow their books by more than \$150 million dollars and 200,000 prospect engagement all online. We have offices in Toronto, San Antonio & Sydney and in our first year of establishment we received a sizeable prize from Bank of Montreal to expand on our mission of building technology that's changing the way advisors acquire clients in this digital era.

Now this is going to be the large chunk of the webinar which is designed to help you build a scalable advisory business. We've tried our best to condense the content into 4 main steps, which we believe are tablestakes, very BASIC essentials to help you do this successfully and hit your goal of bringing in \$10 million in new AUM in 10 months or less.

Step number 1 is to craft your own unique niche to become a authority in the space

Step 2 is to establish a meaningful digital presence online

Step 3 is to develop a sales machine that relies on video to help you stand out

And Step 4 is to automate your workflows to be prepared for scale

Each of these steps covers various steps and strategies within, which I'll be diving deep into in just a minute and when you've learned this stuff the right way, this is what your business growth funnel will look like, super simple yet super effective.

Everything on the left hand of your screen here you already do, but you probably do it by creating scripts, presentation, cold calling or delivery it at seminars. Just the mechanism of delivering it has changed, instead of doing it with a room full of folks at a fancy hotel, you distribute via Facebook, LinkedIn and your digital web presence.

Social media can be a very powerful tool for targeting high-net-worth individuals. The spike in social media usage has helped huge number of luxury brands that serve the same high net worth customers you do, to grow significantly over the last decade. There's no reason for you not to take advantage of this growth.

Professional Money Management firms like Fidelity, Ken Fisher, roboadvisors or larger independent firms have marketing departments with 10-15 people and \$5-10M in budgets to manage this entire process.

The fact is that social media forms a significant part of consumer's decision-making process and research makes it evident that affluent consumers regularly use social media platforms, with 99% visiting social media platforms and spending close to 90 minutes per day on them.

LinkedIn, Facebook and your web presence is like your digital branch – it's where people will find you and interact with you.

Now to set up this funnel correctly. It all starts with first figuring out your ideal customer profile, exactly who it is that you'd like to target via this platform.

Essentially figuring out what type of clients would be the most profitable to your business. Their age, location, profession.. Are they business owners, doctors, dentists, c-level professionals?

When doing this exercise, its best to go to your current client list and look at who are the most profitable type of clients currently in your business. Whomsoever they are, my suggestion would be to target them via our platform as those would be the clients whom your message seems to be resonating with the most.

Be extremely LASER focussed while doing this. The smaller the better. Remember you only need tops 30-40 new clients out of a pool of 10,000 to hit your \$10M goal.

“Niches can be based on just about any criteria,” says George Hartman, CEO of Market Logics Inc. in Toronto. Among the more common criteria are:

Age (for example, pre-retirees, recent graduates, millennials)

Occupations or professions (teachers, doctors, specific types of business owners)

Special interests (sports, hobbies)

Special needs (“sudden money,” such as severance packages, inheritances, divorce settlements, sale of a business)

Special circumstances (children with a disability, elder care, graduating students, divorce, interfamily wealth distribution)

Niches can really be based on just about any criteria. The idea here is to make the niche your own

You wanna think broadly — and narrowly — when identifying this niche market. Among the common criteria we see are their age, occupation, special interests, needs or special circumstances.

Also just going to throw it out there that millennials are a great market. According to the 2019 Capgemini report, almost half – 48 % - of high-net-worth individuals in the world are under 40,, so its essential that we understand how to market to these potential clients — who come from a more diverse range of countries and cultural backgrounds than ever before.

The one-size-fits-all approach that worked in the past doesn’t work anymore because most advisors are going after the same clientele. Now

is the time to be more mindful in terms of deciding who you choose to work with.

Why we are doing this is to figure out who works best for you. There's clients you enjoy working with, their clients who provide the best financial results and the clients for whom you get the best results...the sweet spot is right in the middle. As this is that group or niche who seems to resonate best to your message.

If you have an unfocused approach marketing, it will fail to present clients with a unique value proposition to do business with you.

Then you want to figure out a way to communicate your niche and there are distinct benefits of working with a particular niche of clients.

First and foremost, you become known as the expert to this group of people.

When you focus on being not pushy and instead give lots of information to your niche, which most people don't do. You become more approachable to this group of people and allows you to create more efficient processes based on commonalities. Your process post meeting, during fact finding discovery stage or financial planning stage will be more systemized in turn as well. It helps clients feel more confident in your expertise with this common ground.

Basically what you are doing is you are fishing in a stocked pond with lots of big fish. Your competition lessons and your marketing costs are significantly reduced because your marketing is more targeted. And in

the digital era, it's about claiming your online territory. You're building an online empire, like a digital franchise.

So to summarize, a niche is that little tag line of what YOU bring to the table to attract members of that target market audience to help you stand out.

You want to drill down as much as you can within this niche, until you speak your target markets language.

And why you are doing this is to specialize within that group of people to help you stand out. In the next ten years, advisers will gradually shed their role as investment managers and become more like integrated life/wealth coaches who advise clients on investments, banking, healthcare, protection, taxes, estate, and financial wellness needs more broadly so having done this will pay dividends down the line.

Now onto step number 2 to do this stuff successfully, and get to communicating your niche. You need to establish a digital presence for time tested results.

Everything we've spoken about so far, growth funnel and importance of having a niche – it doesn't mean squawk unless you digitally transform yourself and gain a meaningful web presence. Because without this you won't have the necessary eyeballs actually viewing your efforts.

Let me share with you what the basic platforms are, what the various digital assets constitute of so you don't waste any of your energy when setting it up and instead have a marquee digital presence.

And the way to do this is by getting your digital assets in order to ensure you build your brand to give you web presence just as your office and brand has at its brick and mortar location.

Now It takes a lot of work to turn a cold lead to a warm lead especially when you are trying to do it online where you only have a mere 15 seconds to capture someone's attention.

Once you do this, it should look something like this. With your ideal customer nailed you have this online system in place which is working on autopilot broadcasting your message.

And for those firms where you can't do Facebook advertising due to compliance that is completely okay automation just focussing on LinkedIn and your Online Web Presence will put you 70% ahead of your competitors.

You're doing all this to start start connecting with people that have a high probability of falling into your ideal customer profile bucket.

And the 3 platforms that we suggest you focus on are Facebook, LinkedIn and a legitimate web presence with LinkedIn being the fastest to test with.

Everything you see up on this page is noise. It's a full time person's job. It takes A LOT of work to set it up which is why we recommend automating it all.

Getting distribution online is the hardest thing to do, Just like making cold calls is the hardest problem to physically do. Getting these basics in order is step 1 to get to distribution.

Think of your online web presence as a hub. The more relevant information you provide to your prospects, the more they will take interest. This is your online centre of influence, you can leverage this to partner with business owners, lawyers, accountants – it helps you stand out from your competitors – and create trust online.

Now before we dive into the various variations of digital assets, which are different than digital platforms.

Allow me to explain what the difference is between a website, landing page and a profile page.

You may have paid anywhere from 1500-2000 bucks for a website. A website is like is your branch office. It needs to look professional and welcoming.

A Landing page is like your own office, where a potential client can enter and learn more of what you do exactly, where you can answer questions to them, discover their needs and provide timely solutions. Without people coming to your office you don't have anyone to speak to. To get people coming to your landing page you need to promote it.

Your profile page is like your business card. It's what people look up to determine how credible you are. Your competition is tough, remember there are over 1.4 million advisors in the US and Canada. If everyone is handing out the same business card, your prospective clients won't remember you. This is why you used to pay for a high end shiny matte finish business card. A profile page is modern day version of that.

So initially to start you need a credible online digital identity which will help you stand out like a lion so when people look you up, you're top of the funnel establishes trust right away.

You might be wondering why you even need ANOTHER online profile, you your website, linkedin and facebook up and ready already.

Well short answer is you need to create a digital identity that will help you stand out like a lion.

The objective of this is to get more traffic by increasing your online visibility - the more distribution channels you have the better.

You want to professional copywriters and researchers to build your profile – this stuff is science, needs to be persuasive enough for a visitor to take action. Remember in the online world you only have 7 seconds to capture someones attention before they scroll over

Search engine optimization is super simple—you actually want to show up when people search for advisors on Google

Here are a couple of more high level reasons why you need this today. It's designed to be the de facto source of information about you on the web. A very targeted, strategic profile carefully reflecting your business interests, charity activity and personal interests – something which is monitored 24/7 to keep prospective clients engaged in what THEY may be interested in learning more about you.

And when you do this right you can appear on the front page of organic search results which as you know can be a quite challenging task. The advantage of setting this profile page up properly is to do all SEO, Google my business activities that Google wants you to do under one umbrella.

Having this group approach to your online profile places your profile listing on the first page of search results when people search for you, maximizing your online visibility, helping attract new clients and making it easier for referrals to find you online and most importantly increasing your credibility.

With that in order, you want to look for opportunities to communicate within the niche and this is done by creating specific lead gen campaigns

Most of you guys have a website and social media page – but don't generate leads from them and that's because you're not creating lead-gen campaigns. These are campaigns designed to generate leads off every digital asset!!

To bring in a steady flow of fresh qualified leads, your advisory business needs to run new lead-generation campaigns on a regular basis

99% of Financial Advisors are not technical people, they don't want something that will require technical expertise to punch out as a process because its just too draining. This is something that your front desk admin person can do for you and feed into your distribution channels.

Lead generation plain and simple is the heartbeat of every business, without a pipeline of people whom you could turn into clients simply put you won't be around 5-10 years from today. A business cannot survive with new incoming leads in any economic climate.

And you need to be doing this on ALL your channels simultaneously so your websites, landing pages, social media pages and your profile pages should ALL be collecting leads 24/7 round the clock.

Now to do this effectively you need to use call to actions! You've heard this before if you don't ask you don't get the same principle applies on the internet.

Anything that you share on the internet, any content piece it could be like a 3rd party Forbes article, there is a way to put in a call to action on that article so when the prospect clicks on that Forbes article, they not only can enjoy that article but a little banner with your brand name pops up asking for their email address to submit to your business. This way you're collecting leads on autopilot within all the content pieces you're sharing.

As soon as leads enter your system – you need to remember DATA is the new currency. A data point you can start collecting TODAY is email addresses. The more email addresses you have the more people you can target , the more people who are in your funnel whom you could nurture and engage with your content. Even if you just collect just a 100 email addresses over the next year. Remember it only takes 1 out of those 100 to be a potential million dollar client.

The system here is simple. You get people in your funnel, and nurture them with content continue engaging them with webinars , more touchpoints the better until they take action. The only caveat is for this to work it needs to be VALUE focused.

Then just promote promote and promote your content as much as you can to triumph your competition.

Every month your aiming for atleast 5000 eyeballs on these digital assets. This way you don't even give your competitors light of the day to catch you.

And to do this effectively, you need to become a sharing machine. IF you share 25 content pieces every year, that's 2 a month very doable, you figure out how to atleast 3-5000 eyeballs on these content pieces via your digital assets AND you have a call to action in each piece you share, so that means even if you share from a third party site such as Forbes, a call to action pops up with your name on it this is a no-brainer to get new leads in your business development pipeline, just simple a numbers game.

And the purpose of establishing a digital web presence is to basically create a digital system. Once you do this right it looks something like this. A machine which you've created where you input content, and it spits out new customers.

Now in order to do all this effectively you need to have a meaningful digital presence to actually get results. These digital assets we spoke about earlier are the place where you can start building an audience.

To simplify this system:

Top of the funnel is designed to build awareness about you and the problem you address. It's designed to facilitate awareness.

Middle of the funnel teaches people how to choose a solution. It's designed to convert prospects into leads.

Bottom of the funnel explains why your product is the best solution. Giving the lead an opportunity to make a purchase decision. This is where you have to establish trust and you may do so sharing your other clients success – usually done in person or over the phone. And the entire concept is to flood your prospect with content in a systematic approach to lead to more customer acquisition.

These systems are very complex and require diligence at every step of the customer journey which is where we guide you every step of way. I

will also specify that these systems we're talking about are age old principles from the likes of Dan Kennedy, David O'Leary known as the father of advertising and some of the most successful marketers out there. Time tested principles which have been working for over 100 years now.

Doing this right will amplify your sales efforts and bring clients in on autopilot.

So to summarize, think about it this way. If you don't have people actually visiting your digital profiles, what's the point of all this content and outreach? It'll be dud as you're going to be getting single digit viewership of your message. Having your digital assets in order solves your distribution problem. It allows you to get the right eyeballs at scale, in large numbers. We're talking at least 3-5000 people per month.

- 80% of your time should be spent distributing content, and only 20% creating content. Distribution is the harder problem to solve

- Building a list is super important. The money is in the list. Offering some sort of value to generate leads with people who show interest in your advisory business. And you just need to have a systemized approach to do so

- And hopefully so far you've gotten a better understanding of the difference between various digital assets as well.

Now onto step #3 in my opinion the most important step. How to develop a sales machine that relies on video to help you stand out.

Video is the modern day weapon of choice. 86% of content engaged on the internet comes from video. Before we get into the benefits of video let's touch on what a sales machine looks like. Video is the mechanism used to go door to door on the internet.

And our definition of prospecting is the persistent and systematic method of developing and qualifying sales leads, which involves turning them into "prospects". This is the backbone of the financial advisor sales process.

One of the reasons prospecting is so important is because attrition is always working against you. Clients leave you, get divorced, die, etc. That means your client base will slip through your fingers unless you prospect. Prospecting should be your never-ending responsibility unless you want your revenue growth to slow down.

prospecting is also the most important part of selling. Nothing happens until somebody starts prospecting new customers. The most successful financial advisors are usually the ones who did the most prospecting... all throughout their careers. If you can do this with video, it's like prospecting door to door on the internet.

Now a focussed way of predictably growing your financial advisory practice and we're going to bucket this into Seeds, Nets & Spears.

Planting seeds is what most advisors currently rely on, word of mouth referrals and a little bit of networking. The challenge is that this isn't predictable, you can't turn this into a machine because it relies on others.

Casting nets plain and simple works. Whether you run a seminar, webinar or engage in some sort of advertising it will work but it's a HIGH up front cost.

What's spearing and how can it help you turn your practice into an outbound sales machine? In a nutshell it's outbound and targeted sales.

90% of the most successful advisors around today will tell you they got started by spearing, they either cold called or went door to door hustling for business. Both strategies in 2020 are dead. They just don't work. You ask why? Because the mechanism of spearing still works but it's being done in the wrong marketplace. Nobody wants to welcome a stranger with a knock at their home door, they're skeptical right off the bat same thing goes for cold calling unwanted calls are not welcome by any means in today's era. It's an uphill battle.

However, as a strategy – spearing still works. Just the place where to do spearing has changed and let me show you what's working exceptionally well today. Remember how we shared LinkedIn is like your digital branch office where hundreds of high net worth prospects browse through daily...well that is where you need to be spearing... on LinkedIn, at your digital branch.

And this is what's going to help you become extremely surgical and bullseye oriented in your approach to developing an outbound sales machine.

In the 50s, if you wanted to reach sophisticated affluent investors, you would need to use your feet, in the 80s, a telephone. Today the “vessel of choice” is cold text based outreach (cold email or linkedin message).

Sending cold text is an art, just like door-to-door and cold-calling was in their times. Many understand what it is, however few are versed in its nuances. Many will discount its effectiveness because they haven't yet witnessed “digital alchemy” – the process of floating a cold email or LinkedIn message over to a sophisticated prospect, conducting a

discovery call, and closing a 5-6 figure deal all within a 30-60 day timeframe.

To do this even more effectively, you need educate your clients. You combine cold targeted outreach and an educational event such as a webinar – that my friend is a killer combination.

Clients are curious to know about the financial products you sell but you have to remember that most people don't really understand financial instruments at all. To establish trust with future advisors to work with, clients are looking for advisors who want to work in partnership to grow their business and their wealth.

These educational events are designed to make your life simpler!!!

The old way to do it was to try to fill seats in a room where 20-25 people may choose to attend. The new way to do this is to have on demand webinars available to watch on any device where you're looking for people to spare time and watch a 30 to 45 minute webinar at their own time. The goal of course is to have a lot more eyeballs than just 20-25 people. We're aiming for 500-1000 targeted prospects funnelled in through the webinar over a period of 4-6 months.

And the way to do run these webinars effectively is to explain rather than sell. Steve Jobs did this exact same thing when the iPhone first came out.

This is even more important in the financial industry as it's not well-known or understood by the majority of the population. You as the advisor needs to recognize the importance of explaining in detail the value you bring.

They say it takes 7 years to become a trusted advisor. Anyone who thinks you can short cut the process of building relationships, in our view, is mistaken. I think there are ways to identify people at a key moment they might need help. But, certainly at the top end of the market, it can be a long, long game ☹️ and the way you can win is by being top of mind with prospective clients by educating them consistently.

And this is validated by investors themselves. We did a survey with approximately 1000 HNW individuals who have a net worth of at least \$1 million USD and these are actual quotes from them.

I'll leave this up on the screen for a minute, but it is EXTREMELY clear that the wealth management advisory industry is not keeping pace with the needs of successful business owners like the ones we surveyed. The way to solve this for your future clients is by educating them.

Once you choose your niche, and drill down on the type of webinar that would meet your future clients needs, you need a streamlined process to coordinate a successful webinar. From powerpoint presentations to professional invitations and automated followups – conducting a successful webinar needs to follow a machine like sales process with several touch points to increase client engagement

And ofcourse the goal is to attract more qualified prospects. Whether these are on-demand webinars (where you only need to record it once) but to the client it looks like it's a live recording so it doesn't matter if there is a full packed audience watching the webinar, one on one, or one to family.

These webinars give you the advisor many opportunities to convey authority and credibility which in turn leads to attracting new qualified leads and most importantly establishes trust and credibility online.

Within these webinars you want to cover material that you would present at an events or conference related to the financial needs of your prospective clients.

Topics can be anything from retirement planning, tax saving, financial planning, pinpointing specific stages of wealth. You want to create webinars around the sweetspot to get the largest pool of clients to be interested in your educational event.

While delivering - For this educational event to work effectively, you need to think outside the box.

We work with a client, who does something really unique. Every 2 months he hosts a unique event with goal being to invite 10-15 prospects to test out some Tesla's at a local car dealership where he can establish a warmer relationship with his future clients, and it's also win-win for the dealership who gets more free traffic so they're more than happy to host.

The same concept can be applied digitally [?] before hosting a webinar broadcast online, you can give away a \$100 gift card to one lucky person and they have to attend the webinar to be eligible just as an example.

Let's talk about a very targeted outbound sales strategy that's bound to get you some meetings. The secret tool to use here is LinkedIn Sales Navigator. That is the modern day phone book. Want to expand your rolodex, get on LinkedIn Sales Navigator asap.

If you are trying to set meetings next week – here is how I'll guarantee you 3-5 this week and 7-8 per week down the road.

- 1) Build your list in Sales Navigator and connection with 60-80 new potential prospects every day.
- 2) 8:30am everyday – look at the people that posted in the last 30 days. Make a comment on everyone's post that posted. Play catch up on Monday and Tuesday and then only should be 3-5 a day.
- 3) 9am put out a post that your prospects will find relevant. Highlight a trend in the industry or a tactical insight that they can take action on
- 4) 9:30am start 1 on 1 direct messaging your post from yesterday with no ask to 20 of your new connections. “I like to share content on the xyz space, will message you from time to time if something seems relevant” Personalize this to add value.
- 5) 10am starting on Thursday – go back to your posts from the previous three days and send direct messages to key people that liked or commented to say glad they enjoyed it and would be great to connect – this will be good for atleast 1-3 meetings. Repeat again on Saturday for Thur/Friday for another 1-2.
- 6) Now rinse and repeat forever. This may just give you 3-5 appointments this week but over time, this should get you closer to 7-8 consistently.

And this is what the flow looks like.

The key thing to remember is that prospecting doesn't just stop at initial outreach. The average high net worth investor works with 3 financial advisors, the best advisors are constantly and relentlessly working to acquire their clients.

Here are a few examples of our clients using this strategy to booking meetings with qualified prospects spearing on LinkedIn.

This is good old fashion, outbound prospecting more activity = more sales. Instead of doing it over the phone via cold calling, we do it on LinkedIn to be more targeted in our approach.

Here's a few more examples

This will increase your meeting pipeline

You will be able to speak with HNW professionals willing to meet with you.

You do this this type of sales activity month in month out and your sales pipeline will always be full

This is the strategy in action, direct targeted sales spearing using video, video prospecting to these high net worth individuals. On your screen is an example of us prospecting for advisors, but you could essentially do this to high value CEO's who would be good fit for your practice.

Doing this stuff with video is essentially like going door to door in an affluent neighbourhood on the internet. You can use this to drastically increase response rate and eliminate any back and forth with the client.

When you do all this stuff collectively you are going to create MASSIVE engagement.

We suggest using video messaging for all clients, for welcoming new leads, video webinars to educate your clients, and video content to become the authority in your niche.

Advisors must not forget that emotional appeal is critically important in effective marketing, especially when the products and services themselves look pretty similar. While digital tools are at the forefront of communicating with clients, there is no replacing the importance of a personal connection and video allows you to do build that personal connection online.

Now as you can imagine this is purely a numbers game, more sales activity means more sales results. Based on our results - lets say if you were to send out 1400 connections per month.

Out of that you get a 30% connection rate, which would be middle of the pack from our experience. This would equal 420 connections per month.

Of those you'll probably end up having conversations with 40-60 leads, of which you'll figure out that 10-15 are qualified enough to speak with over the phone or in person. And depending on how good your close is you should be able to bring in new AUM in no time.

So to summarize this step..cold messaging is the modern day cold calling. Webinars are the modern day seminars. Linked and Facebook are the modern day yellow pages and affluent neighbourhood

And if you have a system to do all this stuff together, funnelling people down to become a client you'll have a sales machine in place that builds up your sales pipeline in no time.

So this is step number 4, which might be the most important one. You may ask why, because most US and Canadian wealth managers have struggled to fully deploy some form of recent technology—robotic process automation, smart workflows, to make their advisors lives simpler.

We will teach you here how to automate your workflows to help you scale your advisory business faster than ever before and get light-years ahead of your competitors

You want to use software automating mundane tasks, have 24/7 viewership of your webinars and automated emails and landing pages to direct leads towards.

Essentially when you set up a strong web presence what your doing is this. Your attracting the right traffic, capturing those prospect leads, nurturing them, eventually converting them as clients and then getting additional referrals from them to scale up. It can be a ton of work especially if done manually but it works

And the first question you may have is where will you funnel these clients from? What are your distribution channels that you are attracting traffic from? As mentioned in earlier steps, LinkedIn is mandatory but what about your web presence? You've been sold on this dream to have a modern day website and somehow people will magically show up on the web page and this entire process will magically happen by itself --> that is far from the truth.

The way any website on the internet works is you the search engines to rank you, without the search engines ranking you won't show up anywhere and if you won't show up anywhere you will fail to have a web presence. To show up on the internet which basically means Google Search, you need to produce relevant content and the bet is that this relevant content will be picked up by the ever so smart Google algorithms eventually ranking your site. To do this effectively you need TONS of traffic I'm talking at least 5000 to 10,000 page views in order to even be competitive. For any business owner looking to get ranked by Google, it ends up taking 6-12 months at a bare minimum.

The more links you have available on the internet directing people to your web presence the more Google will pick that up. So this is why having an effective LinkedIn and profile pages are important so you can start to get the popular social media platforms such as LinkedIn linking you.

This system is designed to bring in leads for you.

And when you do it right, get the right eyeballs, you will lead people down the funnel which ends up being a percentages game from there on forward.

And once you nail down on your client, you automate your workflow by using software to book meetings, to create landing pages, to distribute content, hosting online education, scheduling your social media posts and continuously nurturing leads to start engaging prospects that fit your criteria and nurturing leads. You do this three most relevant platforms today. Facebook, LinkedIn and your online web profile.

And from a results perspective, this stuff works really really well. Here are some results from our own top of the funnel awareness campaigns. The key thing here to see is that cost per lead is extremely low. In general we are able to get lead costs in the single digit territory. We highly recommend switching over from Seminars to webinars, purely from the perspective of how cost effective it can be to get eyeballs on your digital branch.

But as mentioned before, it takes a few months to setup and start seeing an ROI on this strategy.

You can see how this can quickly help you scale up your pipeline with calendar full of meetings, getting rid of all old school methods of bringing new business in.

A few key things to remember to get results like this include utilizing the demographics feature by social media platform to target the HNW audience by location targeting, this includes researching postcodes and towns which have a high density of high value properties worth \$1 million dollars. This way you're only advertising to people who you know can afford your product.

And when it's all said and done. This is what the digital content lifecycle system look like

This stuff takes time. It's not a magic pill that bringing in results. It's work. It takes time. Bu have a structured approach to it you can start seeing results as early as month 1 and by month 6 or 7 you should have a machine set up on autopilot bringing new assets in.

Additionally, the high net worth folks have traditionally been early adopters of emerging products, including digitally-delivered services and technology, meaning a mastery of digital marketing is essential to deliver financial services.

So to summarize, you want to automate your digital workflows, have a funnel in place to help you capture online leads use software where you can to be ready for scale and start thinking of your business as a machine so you're ready to scale

Once you prove out your outbound strategy, figure out your go to market message ☞ you need to start casting nets by leveraging systems to obtain these time tested results. This is what takes you to silicon valley like growth curves.

Do you see how if you were to craft your own unique niche, transform digitally, develop a sales machine that relies on video and automate your

workflows to scale your advisory practice faster and get to your \$10M in new AUM goal this year?

If you were to try and do this yourself, you'll probably end up wasting more than 6 months of your time and be stuck in this 'gap of disappointment', like mentioned before this stuff is complex but if done correctly, you're returns can greatly exceed your investment on this.

Now you might be thinking this is a lot of effort and far removed from your natural skillset to get this up and running. And your not wrong this is a whole different ball game. But this is the modern day direct mailer, modern day telephone, modern day seminar which we've showed you so far. The truth is that this is a lot of work and to get it done properly you need a hire a full time marketer to pump out content, a junior level sales intern to do the cold outreach, and a digital marketer to crate the funnels and landing page for you. And then you need to spend atleast 1-2 hours per day to monitor parts of this machine you just created to get really great results.

That's approximately 40 hours of your own time and then the salary of a full time marketer costing you atleast 60K annually, a junior sales intern which you may be able to find \$25-30K annually and then \$70K for a digital marketer because they are pricey!!! Super in demand nowadays. That's atleast 10-12K per month your looking to add on in additional salary

Now we thought this was a problem for most advisors so we created our AUM Growth Platform

Where we work with you and your team for 10 months to help you set this stuff up correctly. The goal being to bring in \$10 million in new AUM within 10 months.

And all this stuff is done without manual intensive labour rather automation and software tools via our AUM Growth platform designed specifically for advisors. We spent in excess of \$100,000 of our money to figure this stuff out.

Again this is for advisory firms who are growth focussed and looking to aggressively add new clients. And specifically those advisory companies who seriously consider the massive opportunity of using social channels to provide investment strategies for high-net-worth-individuals and prove themselves experts in their industry.

Just to show to you how we stack up to the other guys. Each of our automated campaigns has an average of 120 hours of research, writing design testing compliance and automation built in.

The retail price for this 1 hour consultation session alone is worth thousands. With the knowledge you'll take away you can decide to implement all of this on your own. So all we're saying is let's get on a call and brainstorm! This will be the best half hour you choose to spend in terms of hitting your goals!

To make sure you know that I'm not making this stuff up, this is an actual quote from an agency that was put together as a proposal to one of our clients.....as you can see the cost of all this is SUPER expensive. They're looking to charge \$6-8000 just to set it up. Then monthly packages right here in the middle start at 1000 month and with add ons depending on what you want can go all the way up to \$2500 month and this doesn't include the 15% of ad spend they charge should you decide to turn on FB or LI advertising. Completely absurd. Technology is the answer my friends, do not throw your money away!

Here are our case studies again to back up the stuff we've talked about so far.

Here's Mike Miele from Boston

And Jon McIntosh from Raintree who filled up his pipeline by over \$13 million in one year

Yes ofcourse some of the benefits using an AI based automated platform for business development include increasing the amount of revenue you'll bring in, saving precious time, increasing your brand awareness..making sure you spend your time on more high value tasks. Engaging your customer with personalized responses and most importantly the data of exchanges which we'll be able to use to make it better over time as we realize which one is working best.

If you were to hire a dedicated intern or sales person to do this, you need to pay them minimum \$3k/mo

If you were to hire a Business Growth Consultant, you would have to pay them \$5k/mo for a minimum of 12 months

If you were to purchase advance sales training alone, this could cost anywhere from \$25K to \$100k+

We've created the most powerful automated sales funnel for financial advisors that allows you to build your sales pipeline with HNW investors.

A quick recap on the benefits again.

If building and growing your practice is your primary goal, these are the necessary tools and marketing solutions you need to gain traction.

This stuff helps you gain visibility, attract new clients and grow your business with a robust digital presence.

Combining our Advisor landing page, profile page, search engine marketing, and our platform solutions will help you get found online by prospects and existing clients.

You will increase prospect to client conversion and grow your assets under management

Convert more prospects with turnkey online webinar solutions

Retain existing clients by staying top of mind with social media automation

Build business from existing contacts by sharing content through email, and social media

Build referrals through social media prominence and most importantly grow your AUM.

What you get is an optimized profile page, this is complementary to your website because we believe no one out in the market is doing the distribution game right and if we develop a profile page for you we can apply our own skills internally on one domain via this profile to help you crush the SEO ranking game.

Listing in Fortuna's marquee advisor profile directory which will expand your credibility factor online

Use professional copywriters and researchers to build your profile – this stuff is science, needs to be persuasive enough for a visitor to take action. Remember in the online world you only have 7 seconds to capture someones attention before they scroll over

Workflow automation software to help you post content scheduled and frequently across ALL your digital assets

You'll get webinar and additional content access, our video software access

You will get all our digital tools. Funnel and landing page builder

The call to action generator on everything you share and lead conversion tools to help you convert leads when they land on your digital assets.

You'll also be a part of our exclusive group of advisors who are looking to grow their business and we've worked with over 400 of them now to cross share ideas and innovative practices that are working well across US and Canada.

Here are a couple of screenshots of few of the software pieces included.

Here's the scheduler.

The video prospecting tool.

The custom call to action generator.

Alongside you will also get one on one manual reviews where you can jump on a weekly or monthly call to review all your assets with one of our professional experts, develop new sales copy, tweak your approach or review performance data. We're going to be your coach during this entire process.

Everything you see on the left hand screen is what you have to do jazz up your digital assets which we'll guide you through, take an active part in responding to leads and get 1 on 1 support via the weekly calls.

Everything on the right hand side is what we do for you. This is basically marketing essentials today.

Digital marketing actually provides way better value for money than traditional marketing methods, since ROI is a lot easier to track with digital advertising. This means it can be a great way for advisory firms to get the word out without incurring huge expenses.

As a bonus you will also get access to our AI powered video creation tool which helps you convert all blog posts into video content.

All we're asking is speak to us. 15 minutes of your time on a brainstorming strategy session where you can take these ideas, understand them better and perhaps go and implement them because it's tablestakes in today's environment.

Our platform comes with a 14 day free trial and a 30 day risk free money back guarantee for any reason you're satisfied.

Now to summarize again what you get is summarized on this screen.

The real question is It Worth Gambling A Few Minutes of Your Time To Check This Out and book a call with us, (Which If It Does Even HALF Of everything we've shared today on This Webinar) the call session will pay for itself.

Now you probably have a ton of questions, and there's no way I can answer all of them but here a few common one that come up which I'll try to address – ofcourse if some thoughts are still lingering let's get on a call and we'd be happy to answer every single question you have in detail!

These are the top 5 questions we hear so tried our best in answering them. Will this work absolutely yes

Does compliance approve, yes. You own ALL the assets we create

We provide all the solutions covered in this webinar training via software

Results can come as fast as month 1 but generally speaking it till you see consistency would be 2-3 months in since you're starting from scratch.

Keep in mind all results in the digital age are exponential

You may have a ton more questions and we request you book a call where we can discuss a referral partnership and share our ideas further.

As a friendly reminder Fortuna is built for Financial Advisors who are dissatisfied with cold calling, expensive seminars and door knocking.

Our product is the only end to end platform that helps you grow your AUM without wasting your valuable time and money.

All I ask is if you found this informative, book a CALL right below and take away a few ideas to implement on our own. IF you don't book a call, there's no way to validate your learning in this session. See you on the call and thank you for the time and attention!