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Personal Branding for Financial Advisors

What we will discuss

- A definition of brand
- Why building a brand is important
- A BRAND framework
- It’s not all about you

Debunking some myths

First

A brand is not just a logo

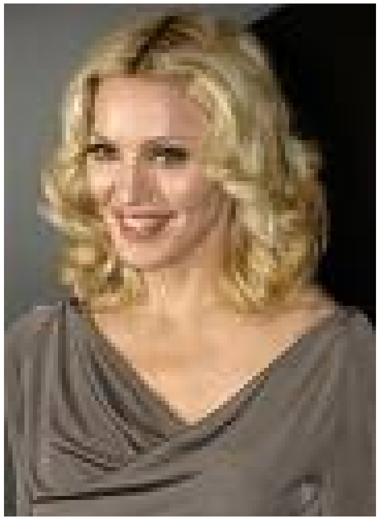
This is not a brand

NIKE®

MOTOR
HARLEY-DAVIDSON
CYCLES

Second

A brand is <u>not</u> a personality



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A brand is not a product

SunWise Essential Series

T CLASS

So What Exactly is a Brand?

A brand is
a person's gut
feeling about a
product, service,
organization or
an advisor

- A brand is defined by **individuals**, not companies, market segments or **audiences**
- It is a **GUT FEELING** because people are:
  - emotional
  - intuitive
  - non-rational

IT’S NOT WHAT YOU SAY IT IS

IT’S WHAT **THEY** SAY IT IS

Personal Branding

Using a deep understanding of your unique gifts and distinct purpose to influence how you are perceived by others.

Why is Having A Brand So Important?

- People have too many choices and too little time

- Information consumes attention

Google

A BRAND Framework

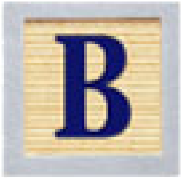
A BRAND Framework

A BRAND Framework

Biography and Business

You as a Person. Your Stories. Your Business

A BRAND Framework



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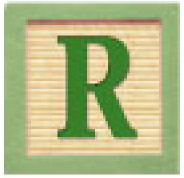

Reasons for what you do/how you act

Business Beliefs and Behaviours

A BRAND Framework

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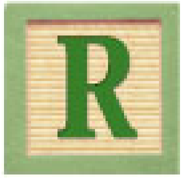

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Actions you take/processes

Client Experience

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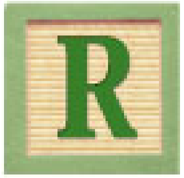

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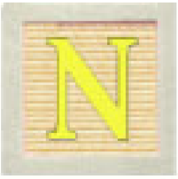

Niche served

The People you Serve. Your Ideal Client. Your "Tribe"

A BRAND Framework

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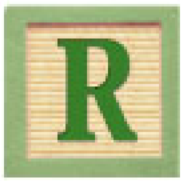

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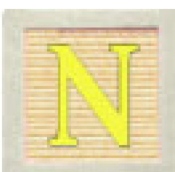
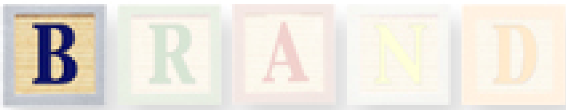


Niche served

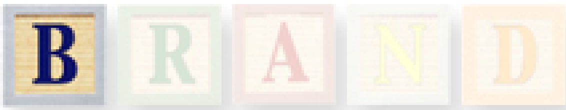
The People you Serve. Your Ideal Client. Your "Tribe"

Differences

Your Focus. Your Remarkable Features.



Biography & Business



Biography

The authentic you

Unique history

Unique experiences

Unique gifts

Whole Person – Doug Towill

Personal

- Small town boy (born in Moosejaw)
- Business junkie (Bcomm. MBA)
- West Coast/Left Coast
- Proud father of twin girls
- Tons of travel – love it

Professional

- 10 years as professional consultant
- 14+ years in investment mgt
- Practice Management - not Product
- Trends and Tools
- “Cutting edge – communicated”

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B R A N D

Tell Your Story

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Stories Say A Lot About a Person

The "Why I do what I do" story

A lesson I have learned …the hard way

The best lessons I learned from my clients

My best partners

My father/my children

A difficult decision and how I made it

The "How I met my wife" story

The "My most embarrassing moment" story

Business

What is the **deep** need that you satisfy?

What is the real value that you provide to the clients?

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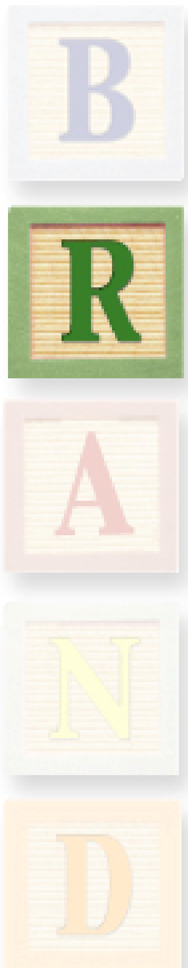
What is your competence?

What are you **really** good at?

What are you **the best** at?

Personal **B**RAND **S**tatement



Reasons

- Business Beliefs
- Behaviour/Actions

A deep search and "fearless inventory"

To answer two questions:

1. What has your experience in this industry taught you?
2. How does it impact your behaviour and relationships?

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BRAND

We believe ______________________________

Therefore we ______________________________

____

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BRAND

Your Business Beliefs

Business Belief #1	**Business Belief #2**	**Business Belief #3**
⇩	⇩	⇩
Behaviour #1	**Behaviour #2**	**Behaviour #3**

Choose 3 to 5 areas your business will **NEVER** compromise

Actions

Processes

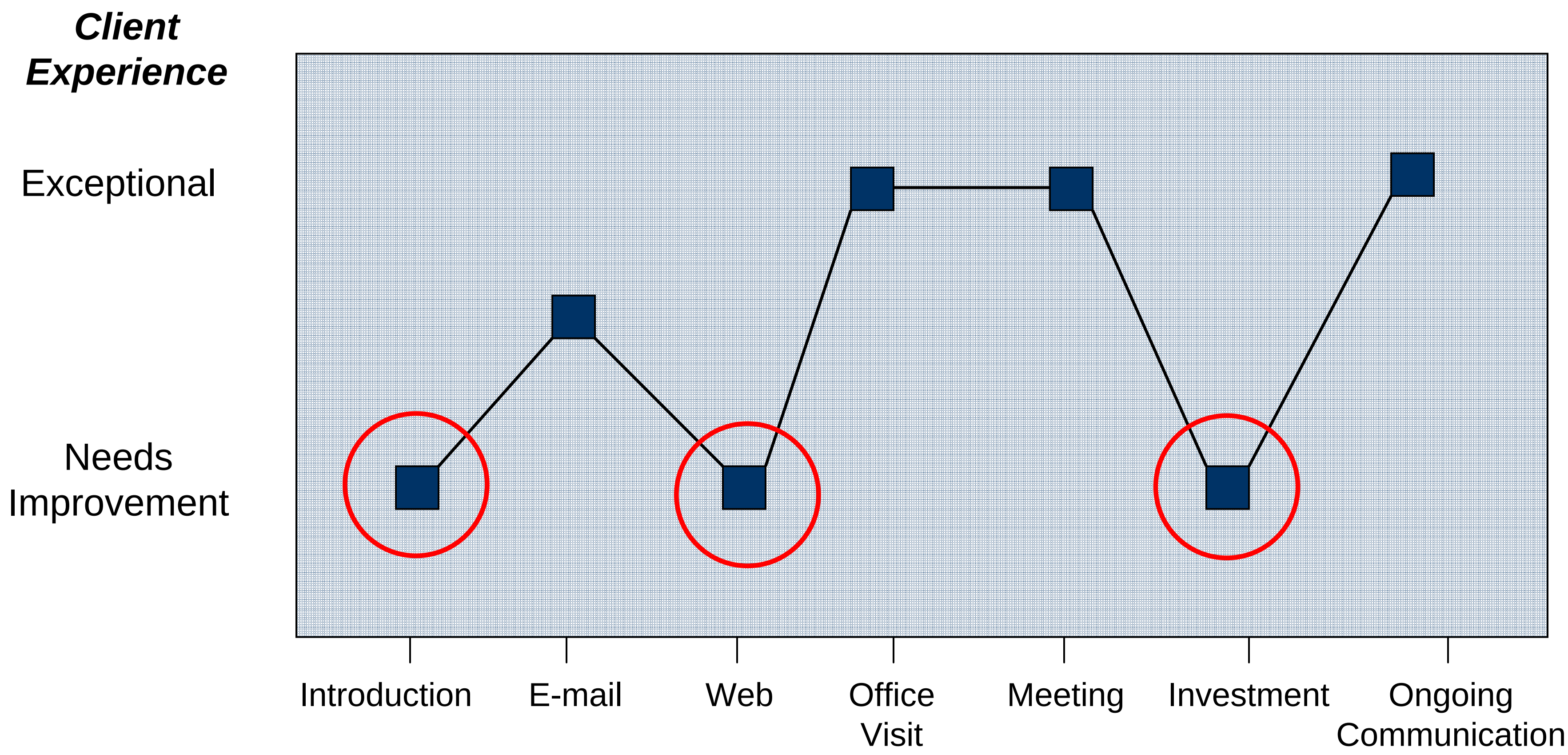
Client Experience

Client Experience

Three Questions

1. What experience do your clients want from their relationship with you?
2. What are the major client touch points or activities?
3. Do the activities provide real value and are they remarkable?

Customer Touchpoint Audit



Process - Example 1

Discover Needs → **Invest** → **Monitor**

Process - Example 2

Step one: Clarify the client's present situation

Step two: Identify both financial and personal goals and objectives

Step three: Identify financial problems

Step four: Provide written recommendations and alternative solutions

Step five: Implement the right strategy

Step six: Provide periodic review and revision

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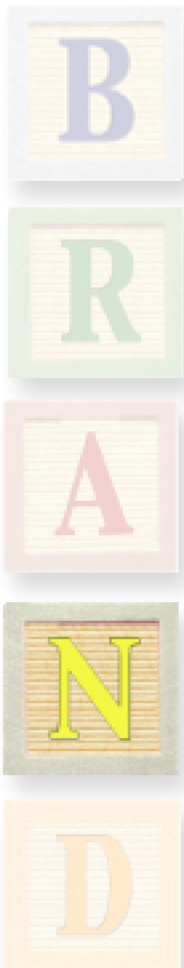
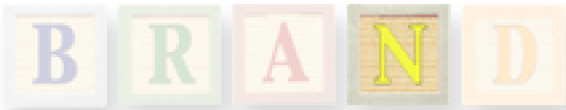
Client Experience - Example 3



Niche



Not **<u>your</u>**
“niche”

<u>Their</u> “tribe”

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The End of Traditional Client Profiles/Categories

From	To
Age	Individuals
Income	Lifestyles
Assets	Personality Traits
Occupation	Beliefs
Gender	Experiences
Family	

Becoming Part of the Tribe

- Identify a specific group - Have they selected you?
- Gain a deep understanding of their issues and needs.
- Create an educational program
- Locate the “watering holes”
  - Regular meetings
  - Common periodicals/publication
  - Their COI’s
  - Their websites
- Package your entire offering to be uniquely attractive to them

B

R

A

N

D

Differences

The three most important words in differentiating your personal brand

Focus

B R A N D

Focus

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Focus

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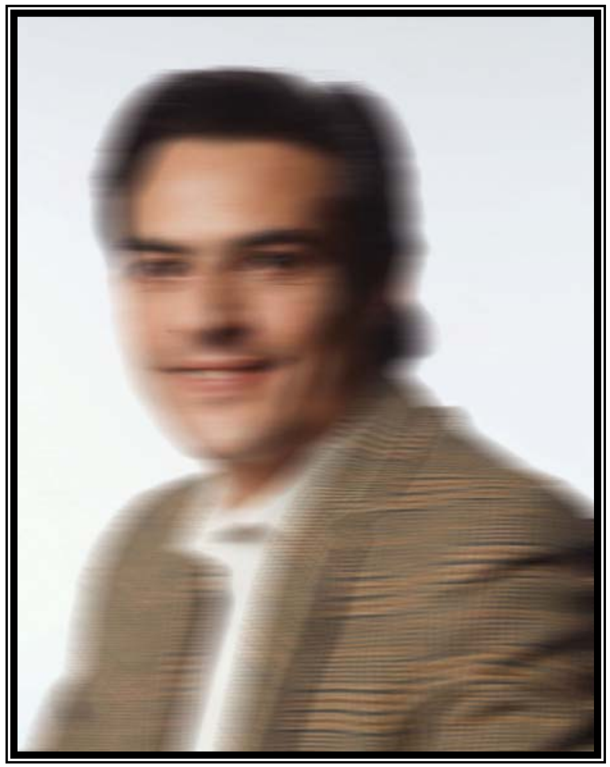
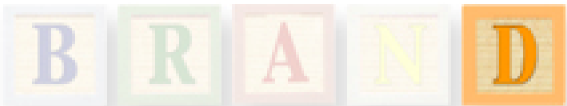
Is This How Your Customers See You?

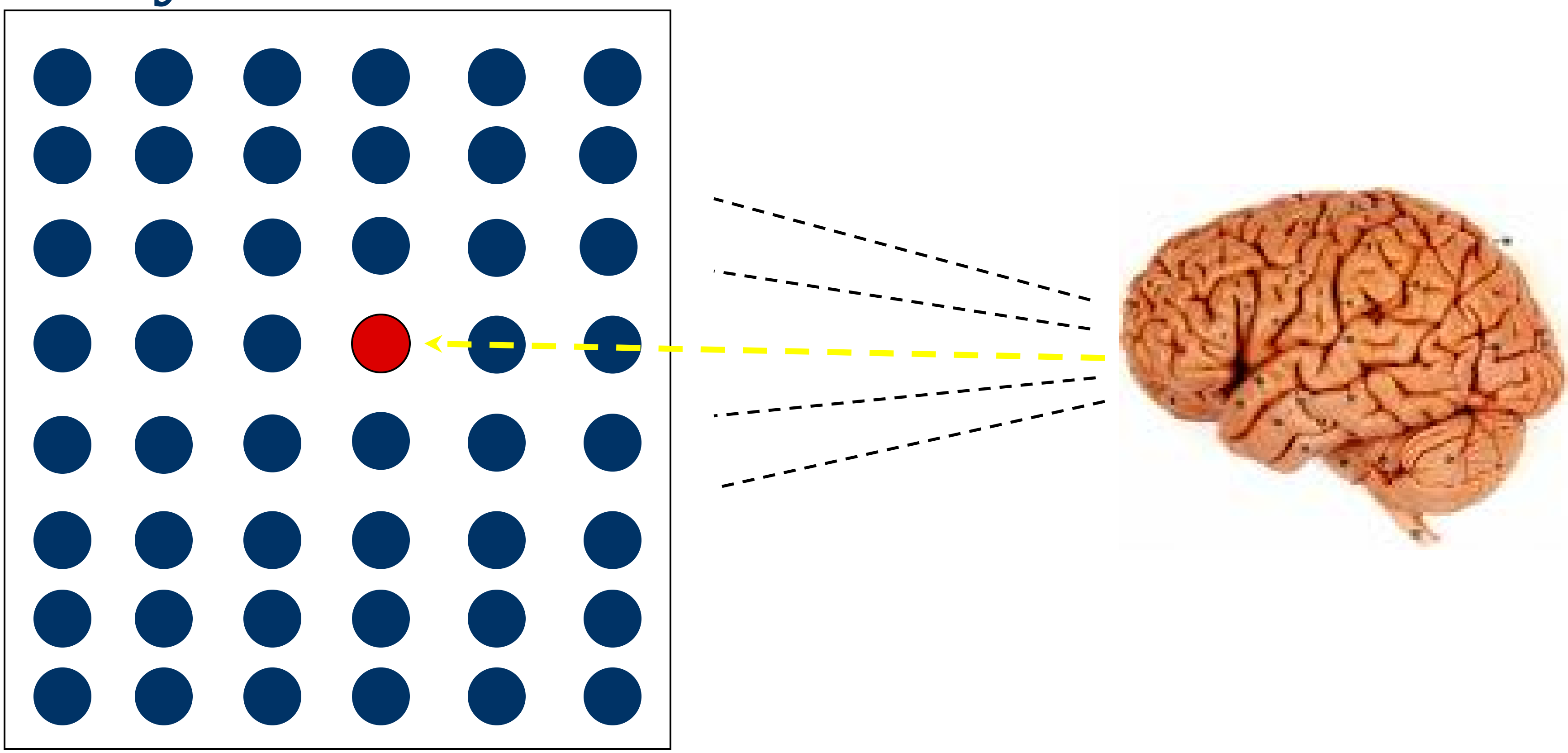


Problem:

- We are “hard wired” to protect us from too much information

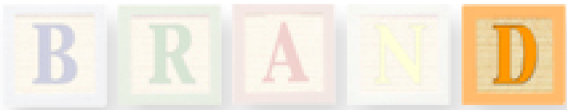


Our brains are programmed to notice only what's different



Solution:

BE DIFFERENT



NO. REALLY DIFFERENT

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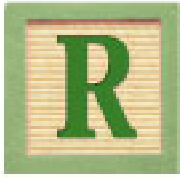

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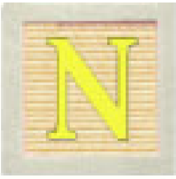
Client Experience



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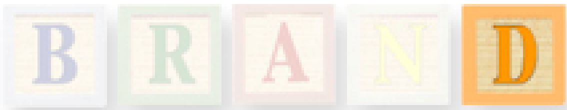
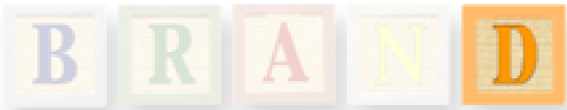
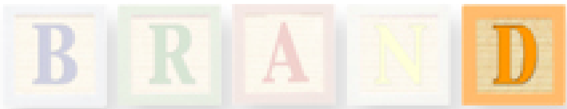


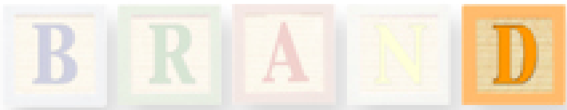
- What Brand do you want to be?
- Brand “X” Exceptional
- Brand “R” Remarkable



Remarkable things get Remarked about



IT’S NOT ABOUT YOU



IT'S ABOUT THEM

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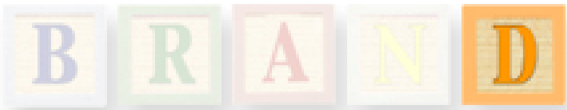
Two Personas

1. Walks into a room and says
   “Look everyone. Here I am!”

2. Walks into a room and says
   “Aha, there you are!”



80/20 RULE

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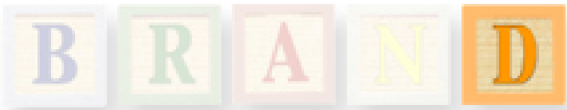


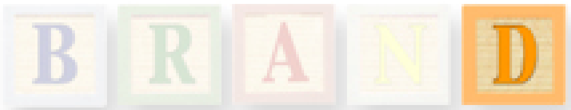
80

Differentiate yourself by:

The questions you ask

The way you listen

The relationships you build



20

Help the clients and prospects by being

very ready to articulate:

Your value

Your brand

Questions?

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Professional Development
Realize Your Potential

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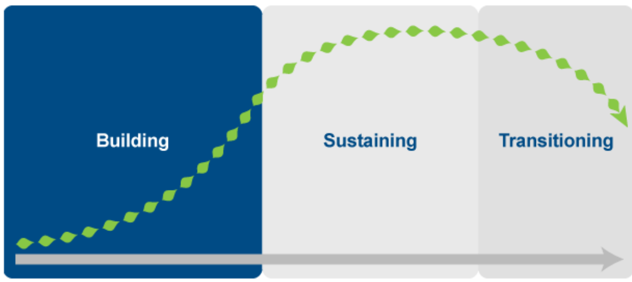
Building



The building phase of an advisor's practice requires a dedicated focus on growth activities to ensure success. This involves developing a unique personal brand, creating an effective marketing strategy, generating business opportunities, and establishing a sustainable client base. The presentations and tools in this section will help advisors in all of these areas.

Presentations

Client Discovery (CD) new
This presentation will provide you with a number of innovative ways to uncover the critical client details that standard fact finding discovery processes inevitably miss.
PPT | PDF

Growth Imperative (GI) new
This presentation will highlight some of the shifts in the financial services business and their potential impact on your practice. It will also introduce three growth strategies that you can use to build your business.

Personal Branding for Financial Advisors (BFA)
This presentation introduces a proven framework to assist you in developing the core messages you need to promote yourself effectively.
Multimedia | PPT | PDF | CE Quiz

Power of Social Networking (PSN) new
The Social Networking phenomenon is growing and you need to be prepared for it. This presentation will explore the potential of Social Media as a marketing tool. It will also help you understand the risks associated with using Social Media and show you how to get started.
PPT | PDF

Managing Your Business
- Building
- Sustaining

Managing Your Clients

Managing Your Development

Tools

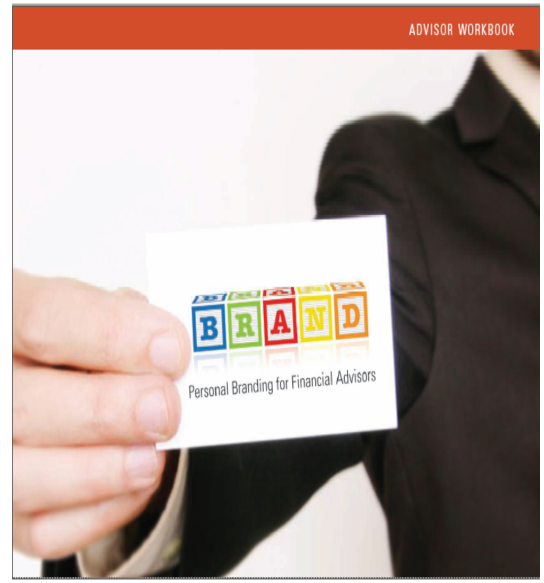
Brand Workbook (BFA)
This workbook helps you develop your personal brand strategy.
PDF

How to Develop Compelling Client Testimonials (BFA)
This tool provides a five step process for getting great client testimonials and shows you how to incorporate them into your marketing materials.
PDF

Life comes at us...fast (CD) new
A chart that you can use to help clients identify what issues and needs their family may face in the future and to help you discuss how your services can wealth planning needs.
PDF

My Life Events Worksheet (CD) new
A worksheet that you can use with your clients to determine the probability and impact of the life events that apply to them.
PDF

Strategy Implementation Plan (CD) new
A worksheet that you can use to develop a plan of action to incorporate any new initiative into your practice. It will help you to detail all of the necessary steps to succeed.
PDF



Thank you