WEALTH MATTERS
CONSULTING

Your Brand Roadmap Workbook

A COMPREHENSIVE GUIDE TO DEFINING YOUR VALUE PROPOSITION AND HARNESSING IT FOR GROWTH

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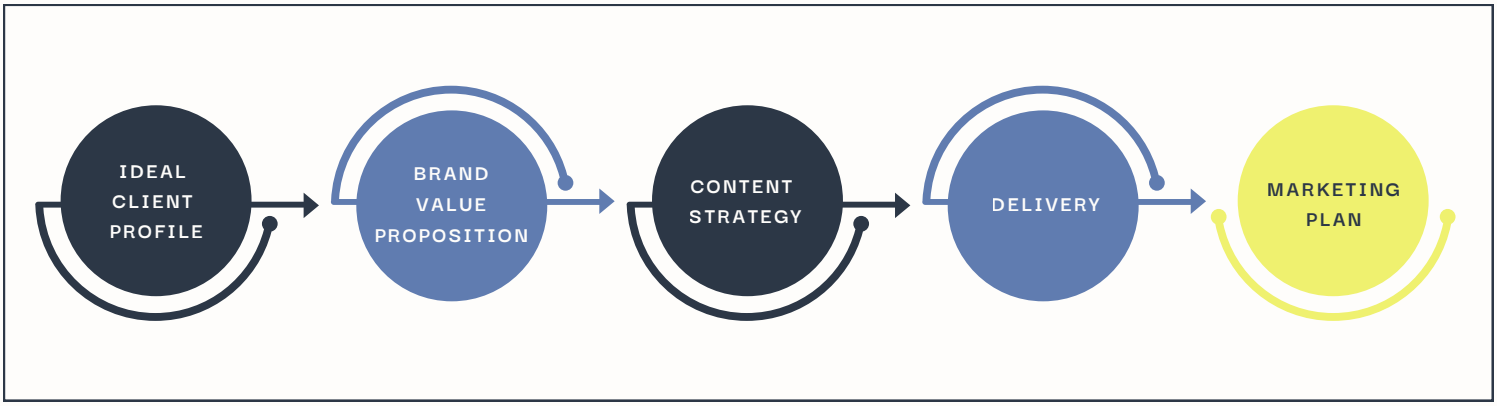
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Creating a Marketing Calendar

Your Brand Roadmap

Most firms start a marketing plan with what THEY want to talk about. But for any marketing strategy to work, the foundation has to be built with your clients in mind.

As with any narrative, your company's brand message and marketing plan need a sound foundation, details to make it compelling, proof points and a solid plan for delivery.

In this workbook, we'll take you through building the foundation, the voice and the value proposition, deciding "what to talk about," and the best way to deliver that content with a solid marketing plan for the next 12 months.



Start at the beginning. Who do you want to work with?

Picture the clients you truly enjoy working with. Focus on the top three. Now imagine if every future client fits that same profile. Your firm would not only thrive, but it would also be positioned for long-term profitability and success.

Let's work on creating their persona.

Q. 1 **What are the financial goals and challenges of your ideal client?** (Are they focused on retirement planning, wealth preservation, or legacy planning for future generations?)

Q. 2 **What stage of life is your ideal client in?** (Are they business-owning families, retirees, or young professionals starting to build wealth?)

Q. 3 **What is their typical net worth or income level?**

Q. 4 **What industries or professions do they come from?** (Are you focusing on clients in specific sectors like tech entrepreneurs, medical professionals, or corporate executives?)

Q. 5 **How do they prefer to interact with their financial advisor?** (Are they hands-on, wanting regular updates and meetings, or more hands-off, trusting you to manage everything with minimal interaction? Do they prefer in-person meetings or virtual?)

Start at the beginning. Who do you want to work with?

continued

Q. 6 **How do they consume content?** (Do they read white papers, or do they prefer podcasts?)

Q. 7 **What is their life view and/or political affiliation?**

Q. 8 **Are they on social media? And if so, what channels?**

Q. 9 **What do they want to hear from you about and how often?**

Q. 10 **What is their investment philosophy or risk tolerance?**

Q. 11 **What personal values or lifestyle factors are important to them?** (Do they prioritize sustainable investing, philanthropy, or family-focused financial planning?)

Q. 12 **What specific services or expertise are they looking for?** (Do they need help with estate planning, tax strategies, investment management, or family office services?)

Start at the beginning.
Who do you want to work with?

continued

BOIL DOWN THESE CHARACTERISTICS TO CREATE A "PERSONA" WITH WHOM YOU WORK BEST.

EXAMPLE:

Women who are newly in control of their wealth.

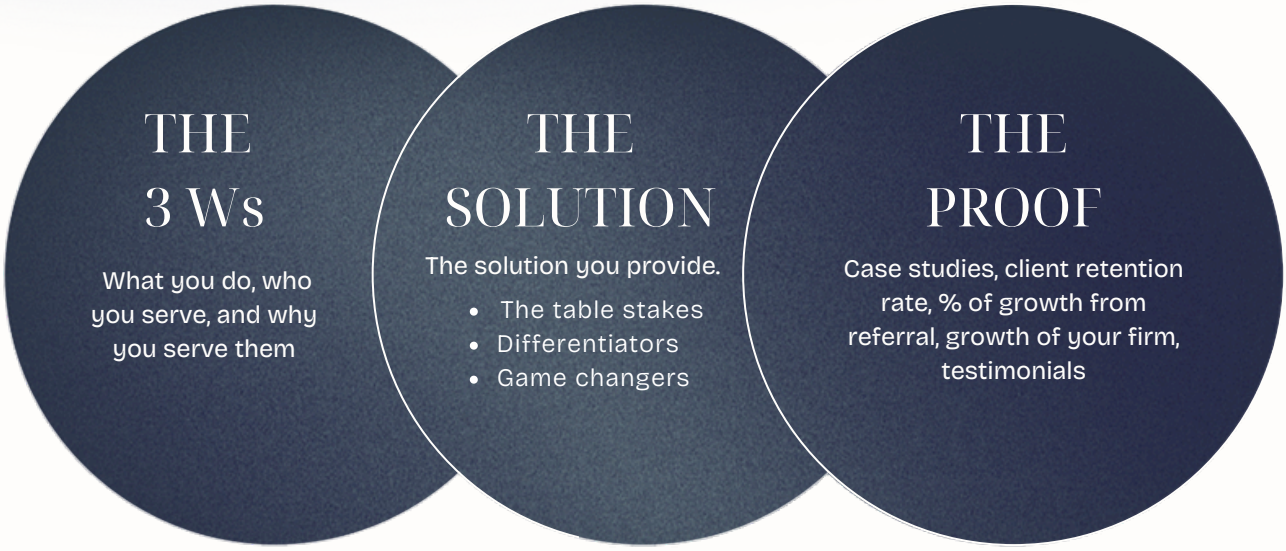
- Seeking specialized advice for financial security post-divorce or death of partner
- Often overlooked in previous wealth management relationships
- Still creating wealth and in need of financial planning
- They listen to podcasts
- The investments they seek are low risk, and need to protect wealth
- Her goal is to provide for her family in this new life circumstance

My Persona:

Building Your Brand Value Proposition

When building your brand value proposition, it's essential to clearly define what sets your firm apart and why clients should choose you.

Your Brand Value Proposition should define the specific elements of your practice. It is typically an internal document used as a foundation for all external marketing communications and messaging. The basic structure is:



HERE ARE A FEW KEY QUESTIONS TO CONSIDER TO HELP YOU DISCOVER YOUR UNIQUE VALUE PROPOSITION:

Q. 1 **What unique problem or need does your firm solve for clients?**

Q. 2 **Ideal clients: Who is your target audience, and what are their core financial concerns?**
(Think of your ideal client profile)

Building Your Brand Value Proposition — continued

Q. 3 **Differentiators: What are your firm's core strengths and competitive advantages?** (Do you offer specialized advice, a personalized client experience, or innovative investment strategies?)

Q. 4 **What services or benefits do you provide that differentiate your firm?** (What specific expertise, tools, or resources do you offer that make your value clear and compelling?)

Q. 5 **Game changers: How do you make your clients' lives better or easier?**

Q. 6 **Competitive edge: Why should clients choose your firm over others?** (What makes your client experience distinct, and how do you ensure clients feel valued and understood?)

Q. 7 **Proof points: How do you communicate the outcomes you help clients achieve?** (Can you show clear, measurable benefits, such as financial security, long-term growth, or achieving life goals?)

Creating Your Brand Voice

What is your unique brand voice? Think of the top five adjectives that best describe your brand's voice and personality.

For example: adaptable, compassionate, ethical, humble and smart.

1.

2.

3.

4.

5.

Identifying the Pain Points

When thinking about how to express your value proposition to your target audience, it's essential to think about THEM. What are the challenges that cause them to worry? What are the sources of their anxiety?

EXAMPLE IDEAL CLIENT PROFILE

Women who are newly in control of their wealth

TOP CHALLENGES:

1. Is there enough money to sustain the current lifestyle?
2. What is the new normal for their financial life?
3. Is there a need for new planning documents? Do we need a new will? Trusts?
4. How will she pay for college for her children?
5. How will the divorce impact her retirement?

TIME TO LIST THE TOP CHALLENGES FACING YOUR IDEAL CLIENT:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____

THE ABOVE LIST CREATES YOUR CONTENT SCHEDULE FOR THE NEXT 12 MONTHS.

Delivering Your Message

Now it's time to decide how to deliver the message, and create your "marketing plan." Consider your ideal client persona – how do they consume information? What is the best form of content to make the most out of your content and message?



PODCASTS

- Ideal for target firm leaders who enjoy conversation
- Target audience listens to content on a commute, or during life activity
- Ideal to discuss deeper topics in a nuanced conversation that might not work in short-form
- Ideal for firms with an extensive network to pull from for conversations
- Ideal for evergreen topics



WHITE PAPERS/LONG-FORM CONTENT

- Ideal for data-heavy, granular content
- Institutional audiences
- Beneficial for Search Engine Optimization, "SEO"



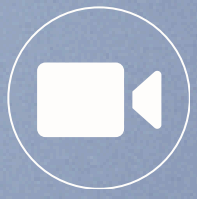
PUBLIC RELATIONS

- Ideal for a firm with a larger marketing budget
- Ideal for firms with $2B+ in AUM
- Ideal for those who may not have time to produce a lot of content internally
- Excellent credibility building to a broader audience



WEBINARS

- Great for educating clients/prospects on complex subject matters that may require the use of data to demonstrate the information
- Best for dynamic and interesting speakers who enjoy video
- Excellent for featuring outside speakers, such as investment managers
- Ideal for an audience who would watch videos during work hours
- Business owners, institutional audience



SHORT FORM VIDEOS

- Great for people who don't have time to write content
- Ideal for short, digestible "tips" or insights that can be delivered in less than 5 minutes
- Excellent format for market updates (weekly)

Creating a Marketing Calendar



The last step to getting started is to create a content calendar to guide your communications. Look back at your "Top Challenges" list and consider how to make those topics timely. For example, a conversation about planned giving may be best around Thanksgiving, when people often consider giving as an end-of-the-year tax strategy.

Also, consider with whom in your network you can collaborate – subject matter experts and an external network are great for adding more "oomph" to your content!

EXAMPLE

NOVEMBER

Monthly Theme: 'Giving Back'	DATE
White paper "How to Give and Donate Stocks"	NOVEMBER 06
Podcast - "Involving Family in Giving"	NOVEMBER 14
Lifestyle - "Happy Thanksgiving"	NOVEMBER 24

continued on next page

JANUARY

Monthly Theme: **DATE**

FEBRUARY

Monthly Theme: **DATE**

MARCH

Monthly Theme: **DATE**

APRIL

Monthly Theme: **DATE**

continued on next page

MAY

Monthly Theme: **DATE**

JUNE

Monthly Theme: **DATE**

JULY

Monthly Theme: **DATE**

AUGUST

Monthly Theme: **DATE**

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SEPTEMBER

Monthly Theme: **DATE**

OCTOBER

Monthly Theme: **DATE**

NOVEMBER

Monthly Theme: **DATE**

DECEMBER

Monthly Theme: **DATE**



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