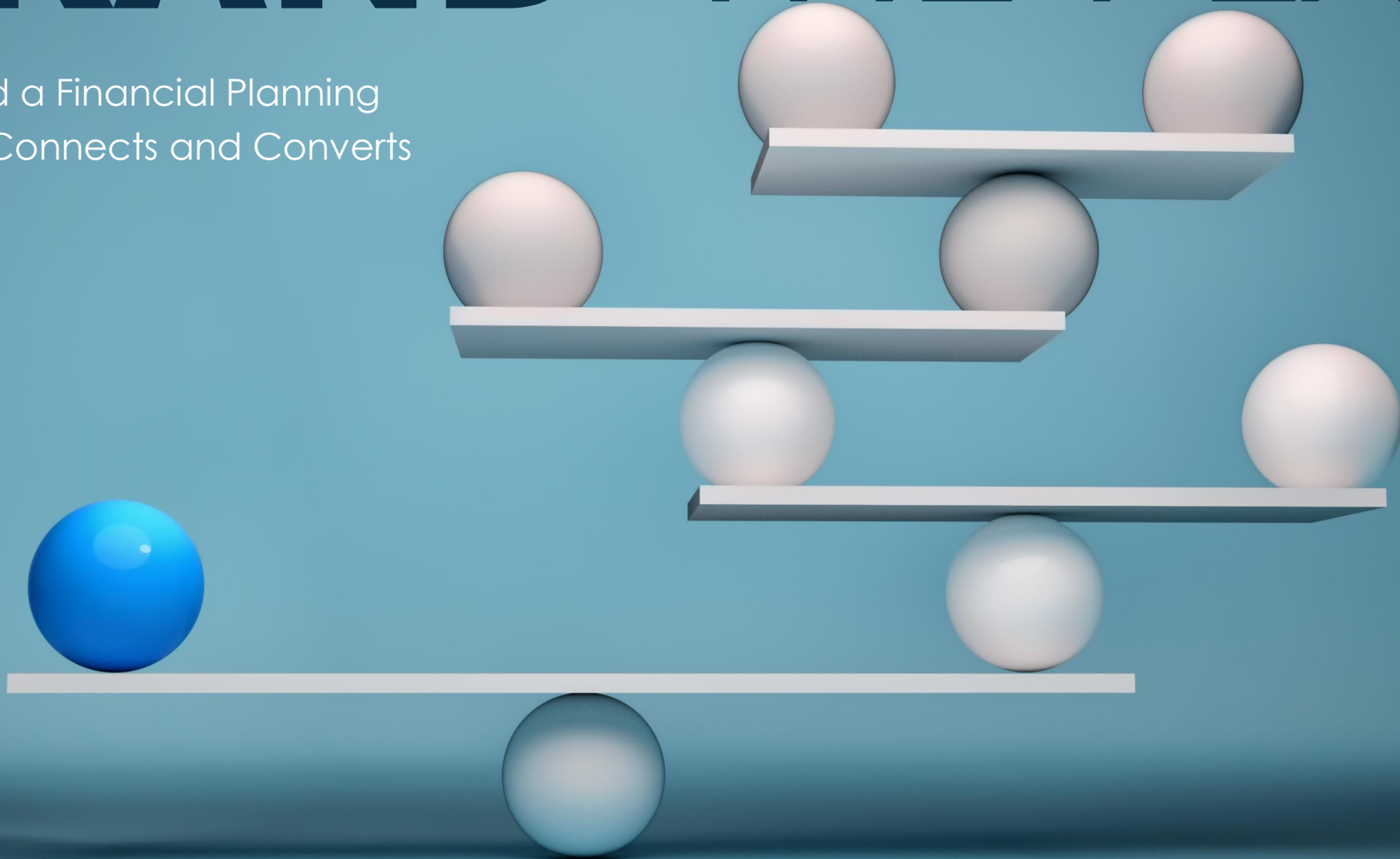


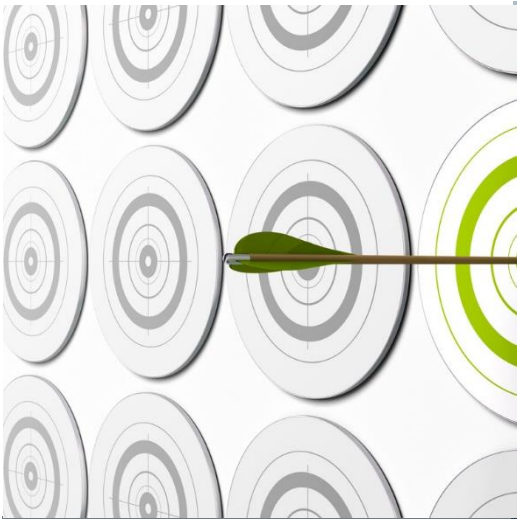
# BRAND THE PLAN

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

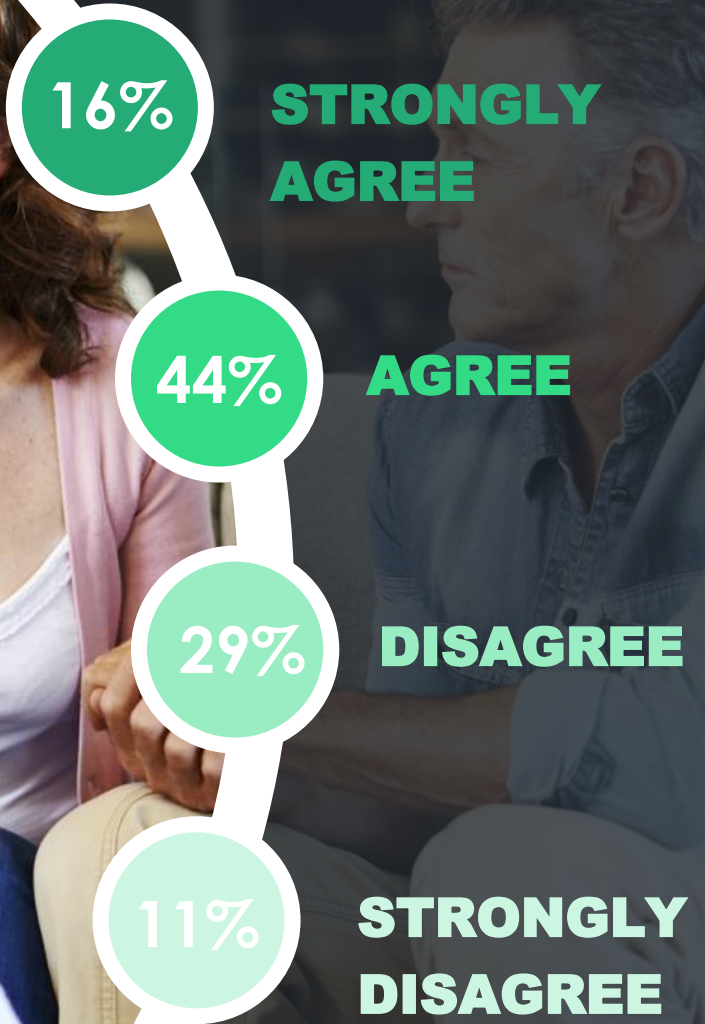
## Rising Expectations

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



# DO ALL ADVISORS SAY THE SAME THING?

## HNW INVESTORS THINK SO





So how do you differentiate your firm through planning?



# BRAND THE PLAN

# KEYS TO THE ART OF BRANDING THE PLAN

# 2



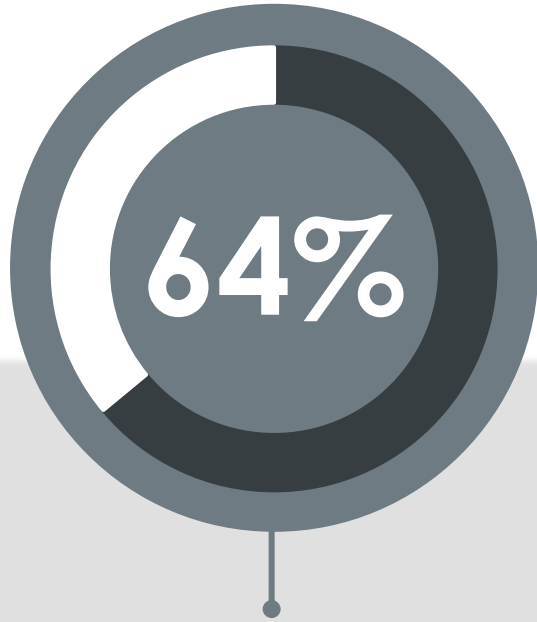
YOUR MESSAGE **MUST BE**  
COMPELLING



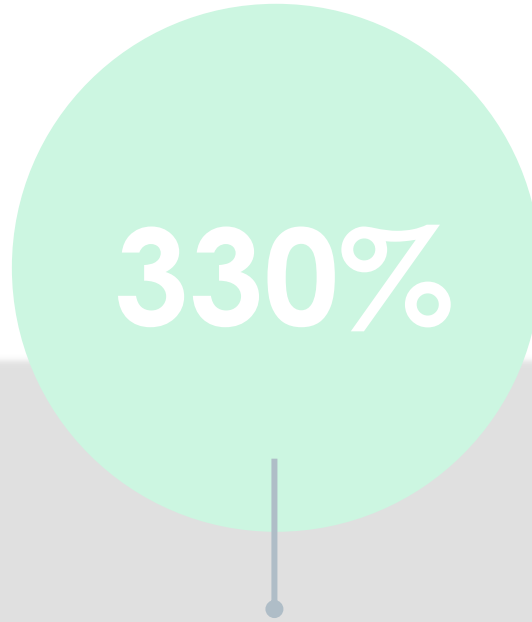
Ingredient #1



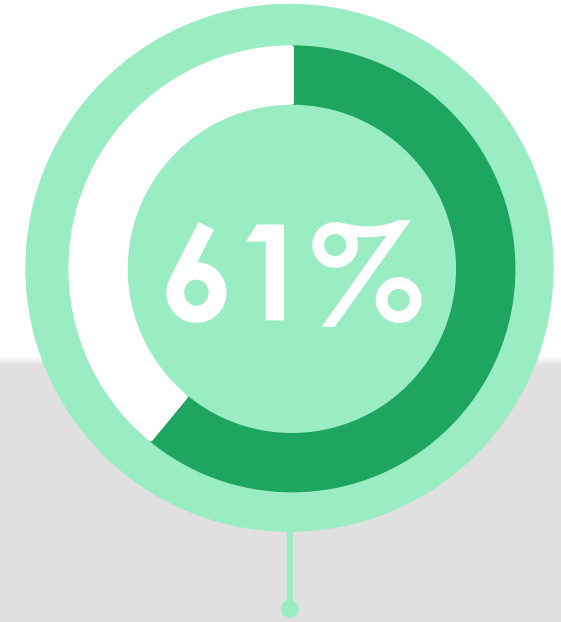
# Sometimes Simple Is Savvy



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  




SHAVE TIME. SHAVE MONEY.

WELCOME TO YOUR  
**BETTER BATHROOM**  
IT JUST GOT A LOT COOLER IN THERE.

YOUR BRAND MUST BE  
**AUTHENTIC**



Ingredient #2

“I like shaving  
with a dull razor.”  
- No one, ever.

CHANGE YOUR BLADE EACH WEEK

A man with glasses and a dark jacket is speaking on a stage with his arms outstretched. The background is orange with yellow bokeh lights. A large dark circle on the left contains a quote and the name Simon Sinek. There are also several white-outlined circles of various sizes at the bottom left.

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

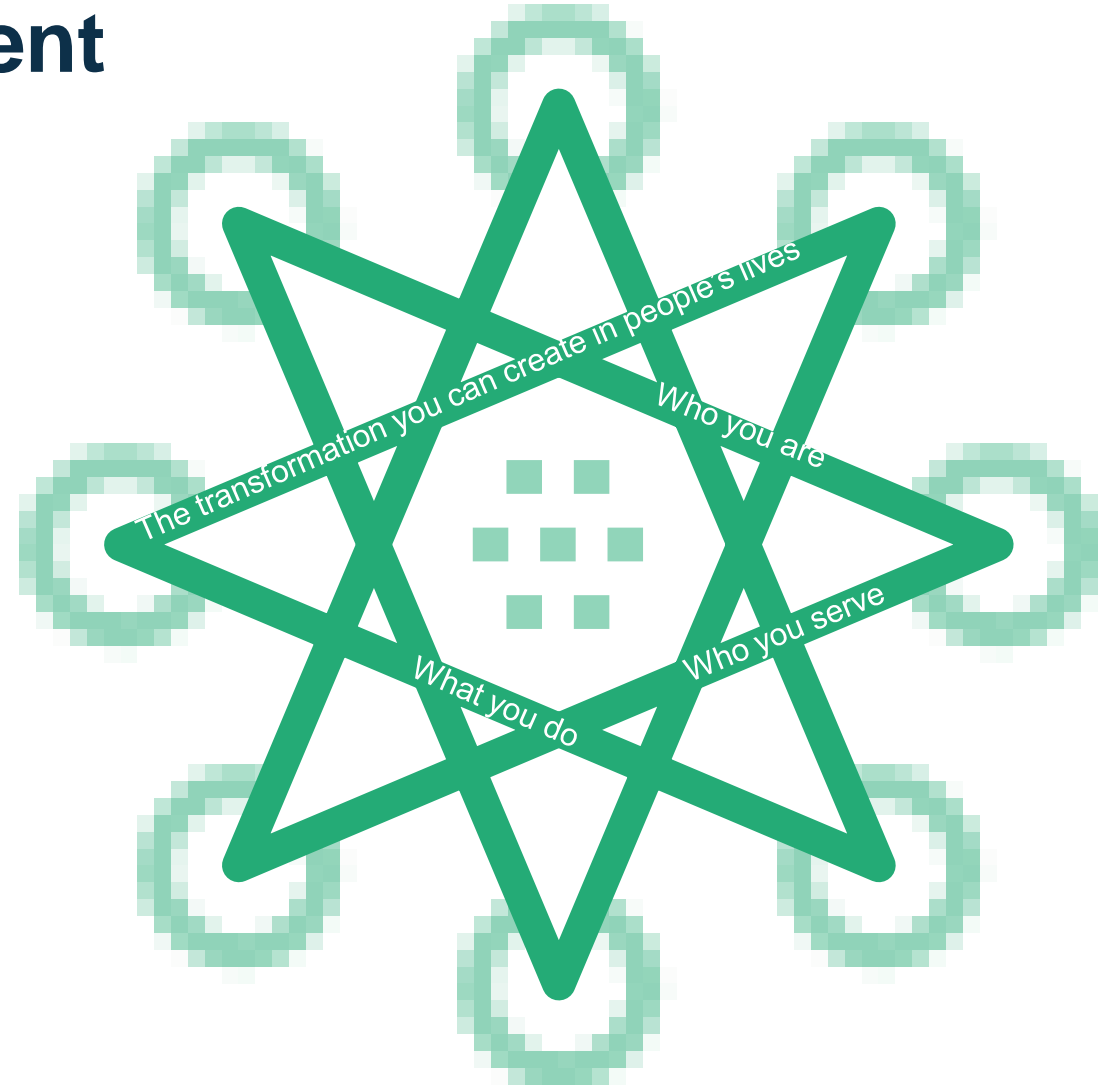
*And what you do simply proves what you believe.”*



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 Wealth

## **WHY:**

Your freedom: A life designed around your values, purpose and the difference you want to make in the world.

WORDS: Design, purpose, freedom

## **WHAT:**

A plan that aligns every aspect of your finances with your deeper meaning and vision for the future

WORDS: Plan, align

## **HOW:**

The Find Your Freedom Planning Promise and Proven Process

WORDS: Custom, 360-degree plan

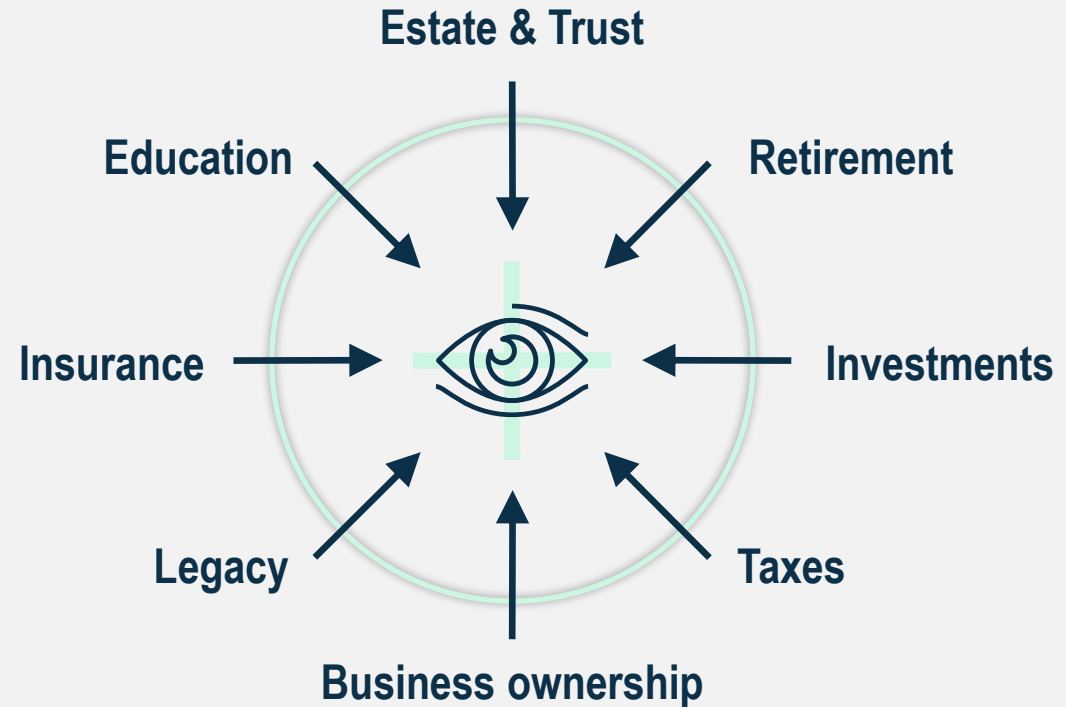
# | Supporting points

- 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

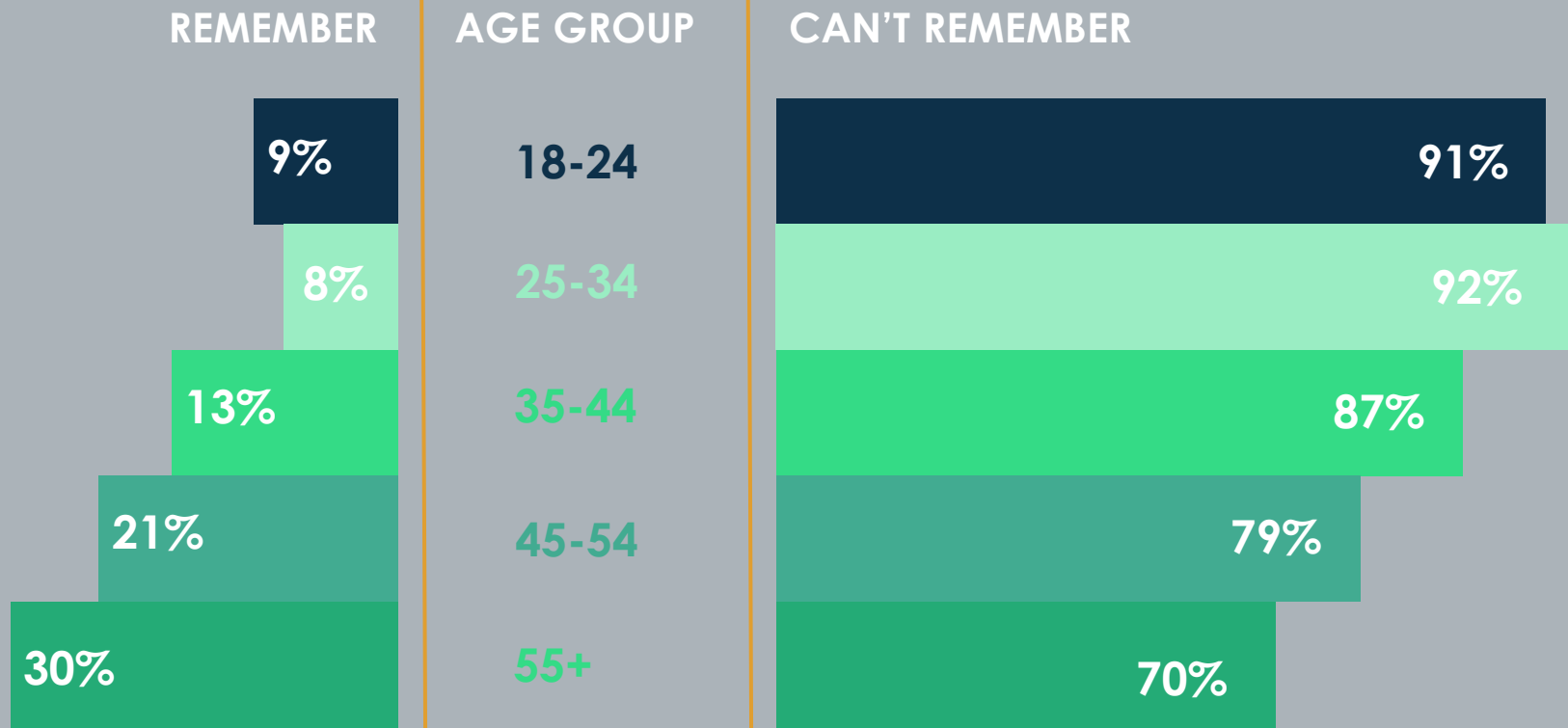


# Supporting points

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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.

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



CARSON  
COACHING



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



CARSON COACHING



87%

Say they want  
"meaningful relationships"  
with brands.

66%

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



# Communicate Your Value and Your Purpose



**Connecting Wealth with Purpose**



**Life Map**



**Aligning Life and Wealth**



**True Wealth**

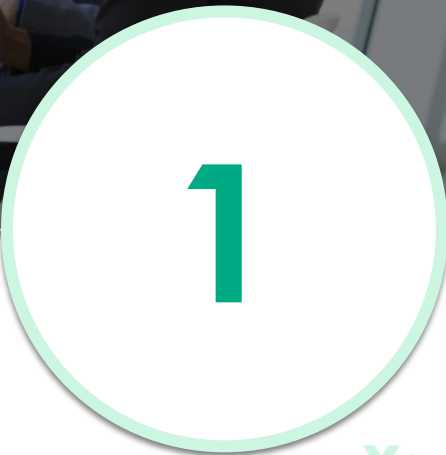


**Live Well**



# The Two

# E's



# 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





The Two



E's

**EXPECTATIONS**

They know they love you – now what?

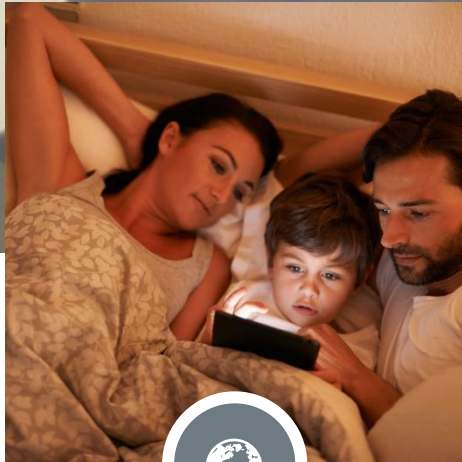
### **Know & Tell Your Story**

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.

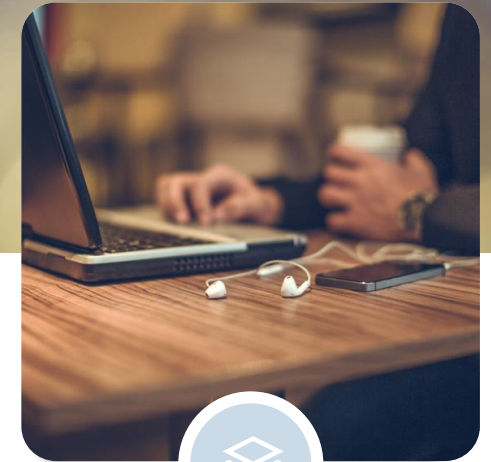
# Align Plan Type with Needs



**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



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



# 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.