



EXCELL 24



FROM STRATEGY TO EXECUTION

Learn How We Market to High-Net-Worth Clients



Paul West
Managing Partner

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Marketing Manager



Welcome



Paul West
Managing Partner



Cassie Cheek
Marketing Manager

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- Sales & Marketing Plan
 - Value Proposition
 - New Client Acquisition
 - Gifting Strategy
 - Additional Initiatives
- 



Sales & Marketing Strategy

Our 2024 Sales & Marketing Plan

- Importance of a set plan
- Strategic objectives and key initiatives
- Enhance current practices, find efficiencies and explore growth opportunities

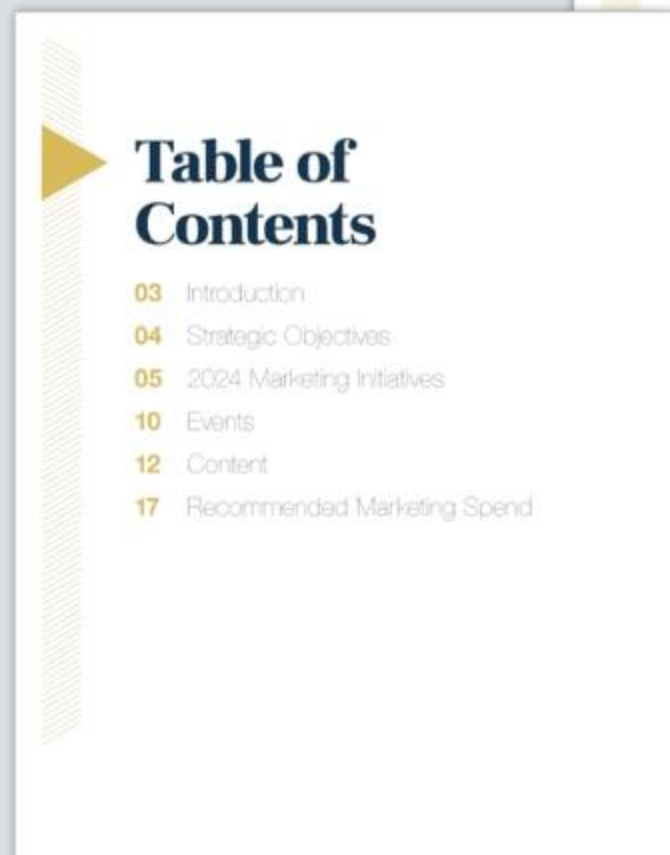


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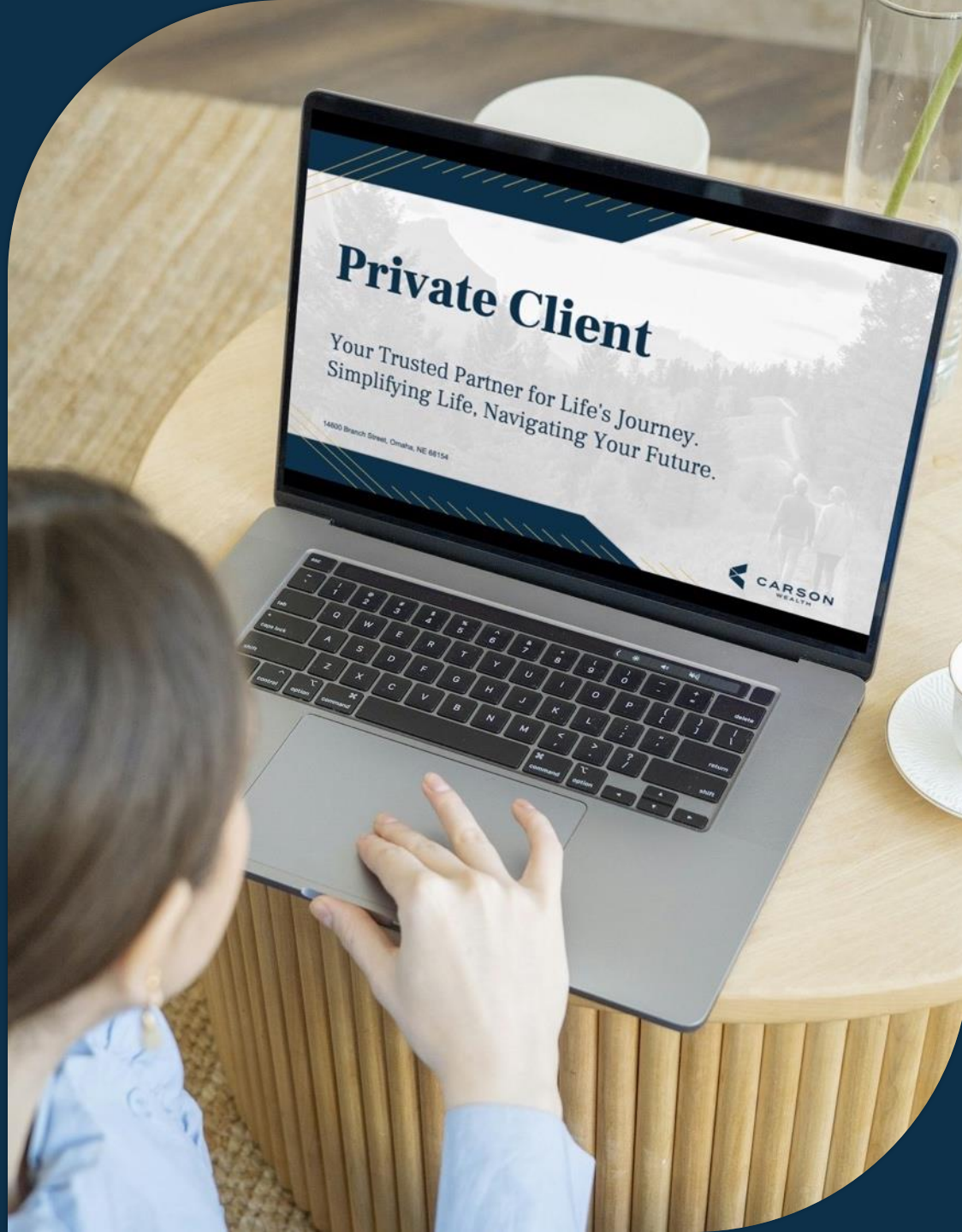


Strategic Objectives

- 1 Client experience and retention
- 2 New client acquisition channels
- 3 Leverage and maximize partnerships
- 4 Build upon existing COI relationships
- 5 Client and prospecting events

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Our Value Proposition

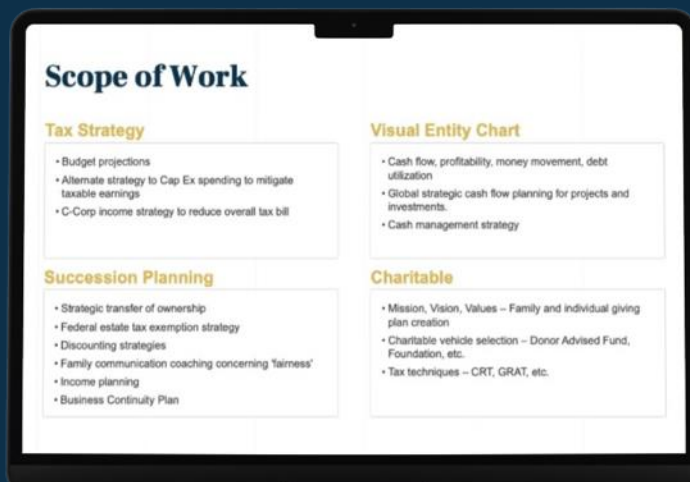
The VIP Experience

Understanding Your Target Market

- Who are high net worth clients?
 - Business Owners & Entrepreneurs
 - Executives
 - Multi-Generational Families
- What makes them different from other clients?
- Personalization is key



Essential Components of Our Value Prop



➤ Outline scope of work



➤ Identify top 3 priorities



➤ Implement minimum fee

Scope of Work

Tax Strategy

- Budget projections
- Alternate strategy to Cap Ex spending to mitigate taxable earnings
- C-Corp income strategy to reduce overall tax bill

Succession Planning

- Strategic transfer of ownership
- Federal estate tax exemption strategy
- Discounting strategies
- Family communication coaching concerning 'fairness'
- Income planning
- Business Continuity Plan

Visual Entity Chart

- Cash flow, profitability, money movement, debt utilization
- Global strategic cash flow planning for projects and investments.
- Cash management strategy

Charitable

- Mission, Vision, Values – Family and individual giving plan creation
- Charitable vehicle selection – Donor Advised Fund, Foundation, etc.
- Tax techniques – CRT, GRAT, etc.



Getting Started – The First 90 Days



Options of Engagement



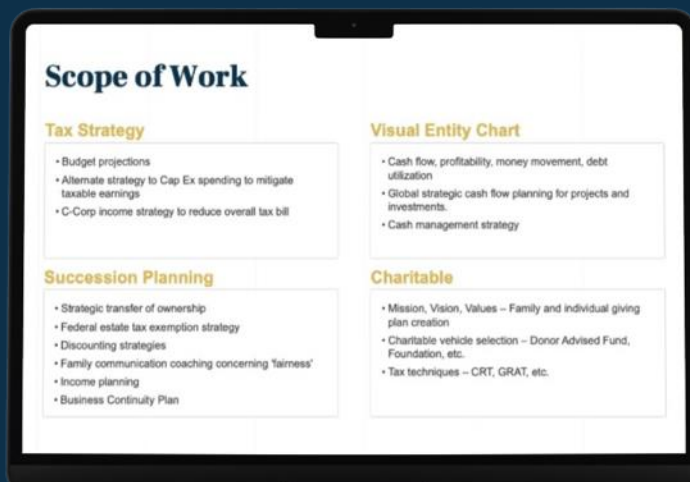
Fixed Fee
Starting at \$5k/month



Liquidity Management
Tiered fee schedule



Essential Components of Our Value Prop



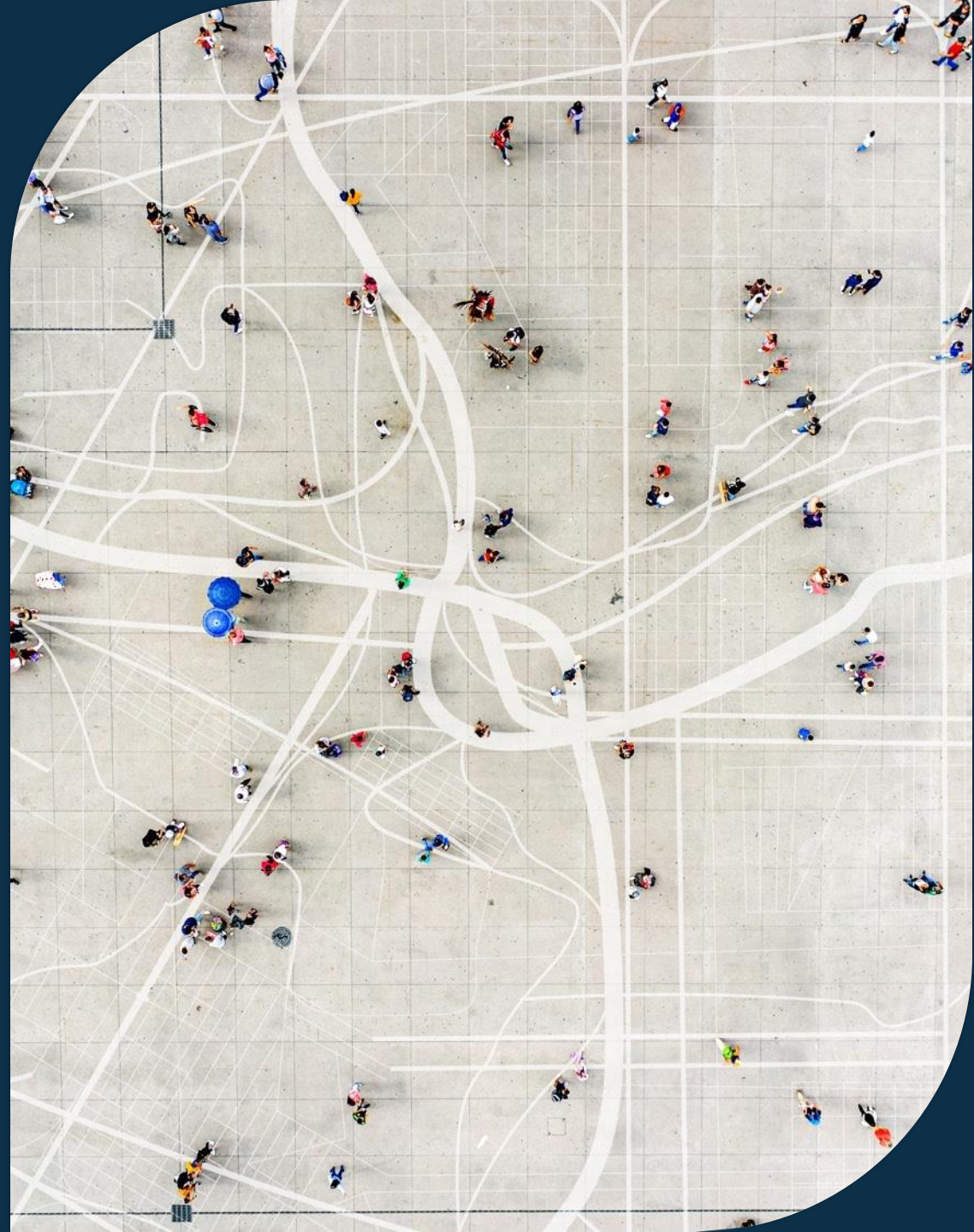
➤ Outline scope of work



➤ Identify top 3 priorities



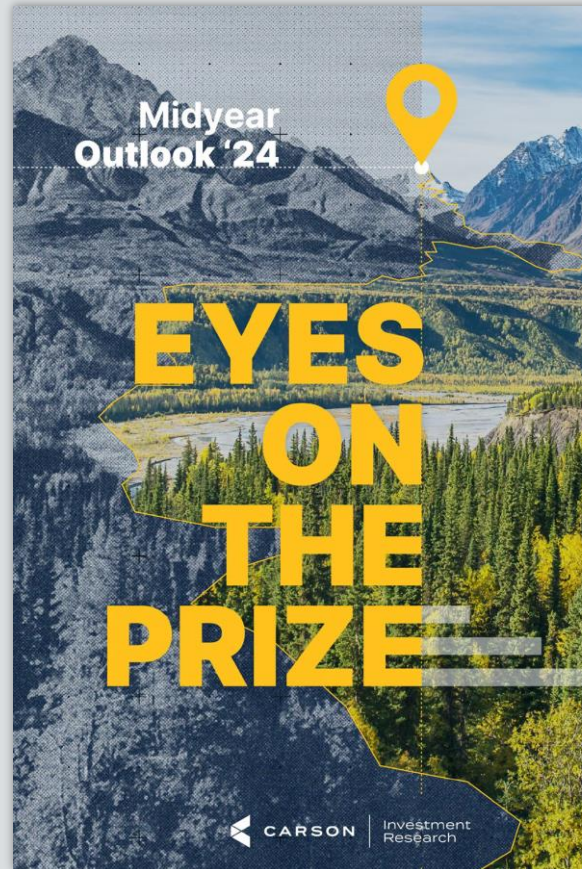
➤ Implement minimum fee



New Client Acquisition Channels

Leveraging & Maximizing Partnerships

- Content created for COIs
 - Monthly email
 - Webinars
 - Presentations
 - One-pagers
- Communication and events plan



Engaging Client & Prospecting Events

- Importance of events in client acquisition and retention
- Appreciation
- Entertainment
- Passion prospecting
- Webinars
- Roundtables



CEO Roundtable Embracing the AI Revolution

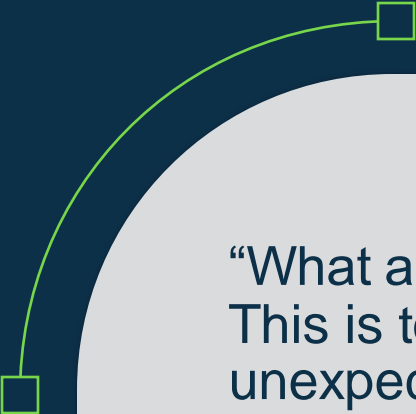
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Transforming
Relationships Through
Gifting



“What an incredibly, thoughtful gift! This is totally unnecessary and unexpected, even the knives being engraved is just such an incredible touch!

Thank you, thank you thank you, and we feel honored to be a part of this entire group, and even more specifically you!”

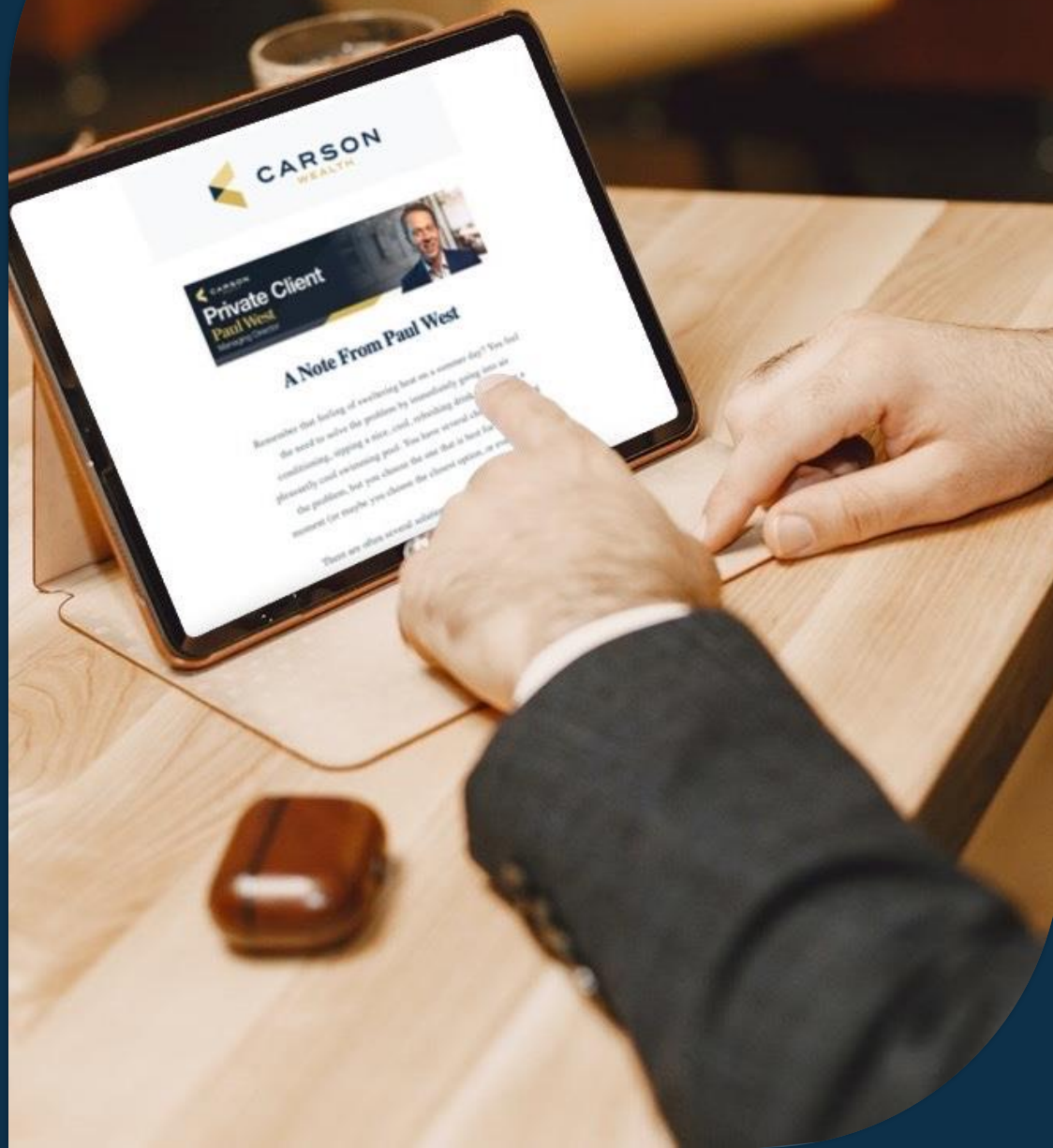
Prospect

“I look forward to working with you all in the future.

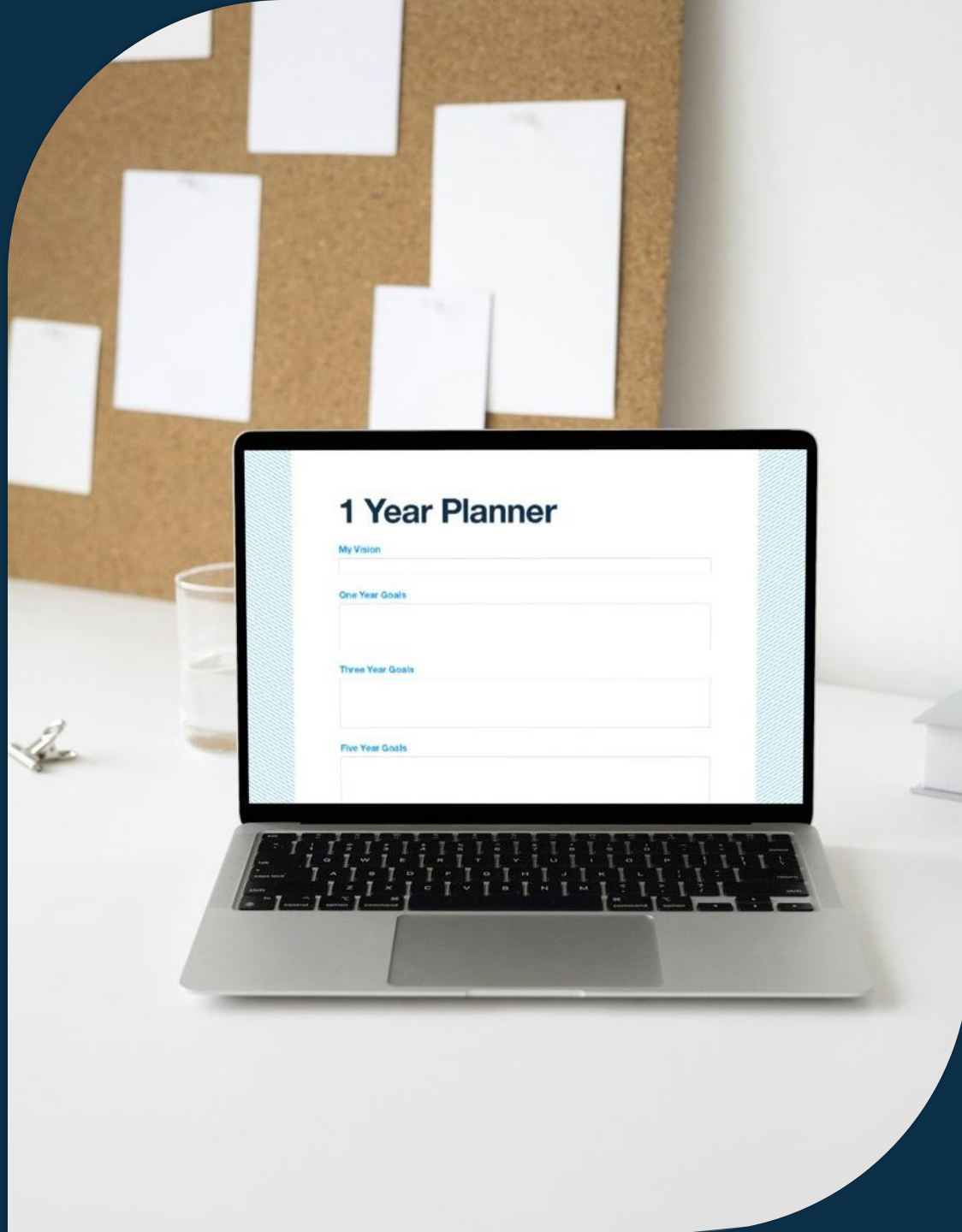
Also, thank you for the awesome cutting/serving board. I served a beautiful cheese spread on it last week and got SO many compliments. You all are the best.”

Client





Additional Initiatives



Execution & Accountability

A decorative frame with rounded corners, featuring a solid dark blue border and a dashed light blue border. The frame is set against a solid dark blue background. The word "Questions?" is centered within the frame in a light blue, rounded, sans-serif font.

Questions?

Thank you!





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