



EXCELL 24

Leaders Lead, Not Lag

How to Use Leading Indicators to Drive
Success as an Advisor.

Paul West
Managing Partner
Carson Wealth

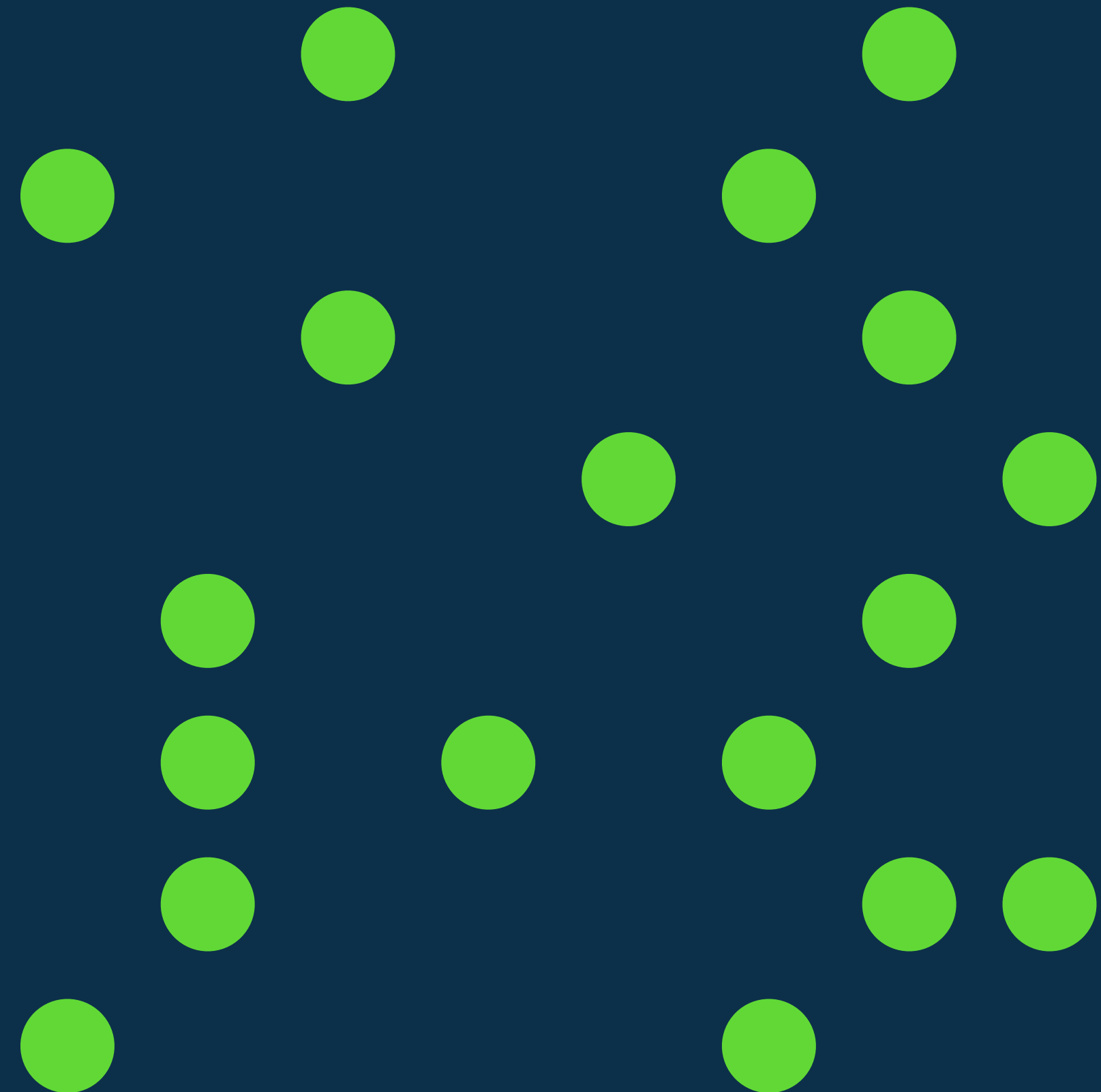
Business Development



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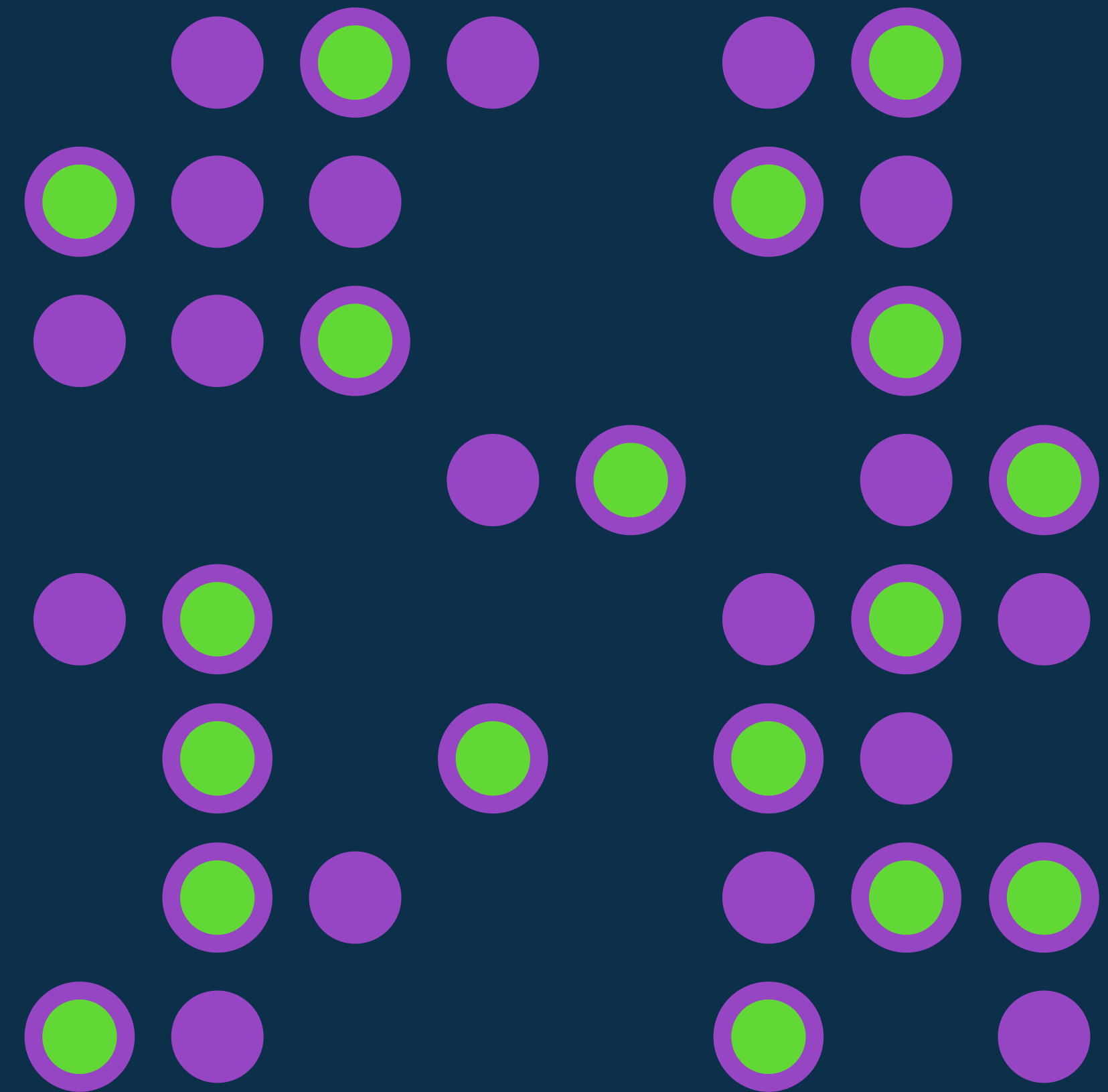
New Year, New Goals – “Ideal” Clients

18



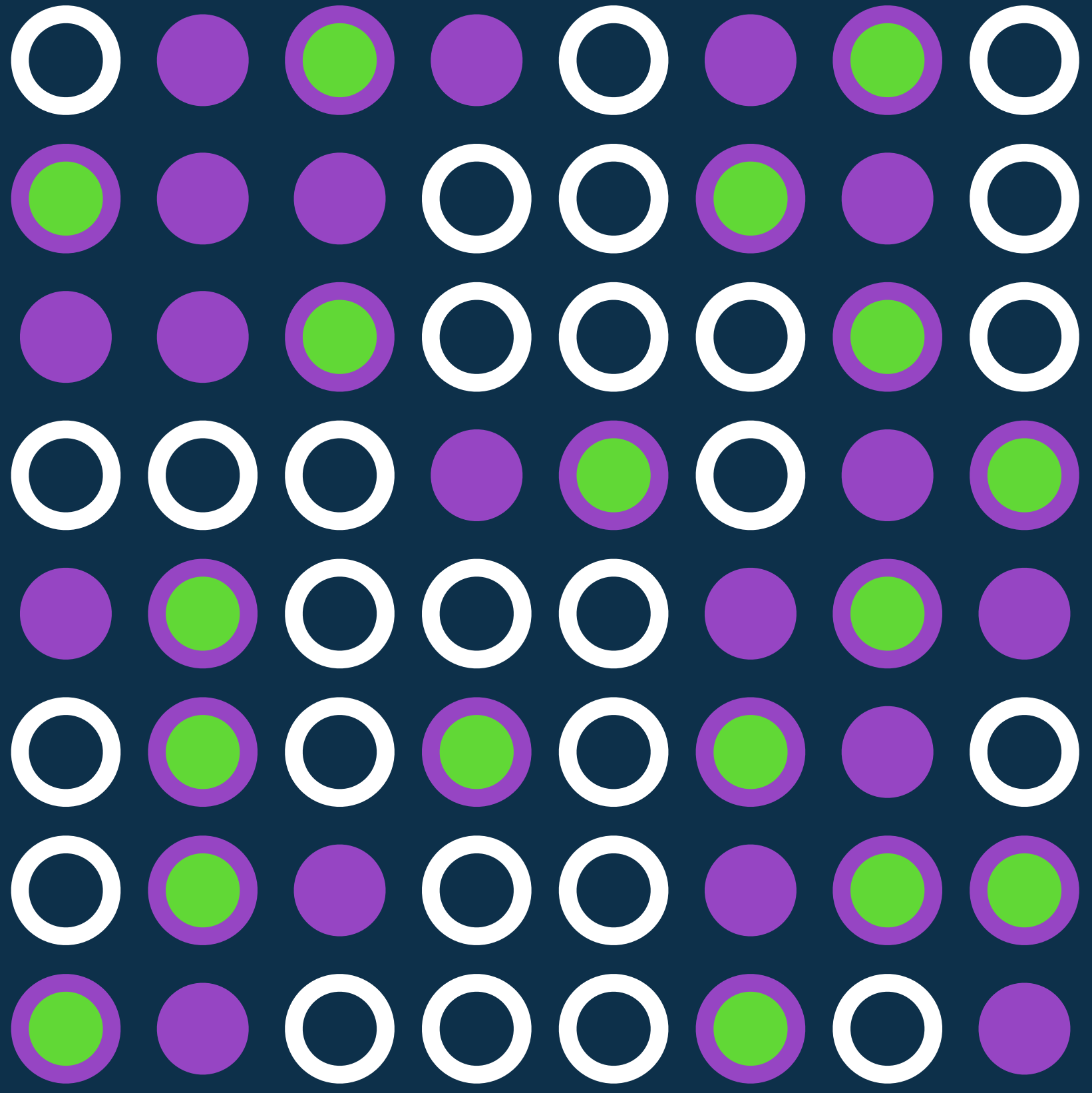
New Year, New Goals – Opportunities

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New Year, New Goals – New Leads

72



2024
Carson
Private Client
**Marketing
Plan**



2024 Carson Private Client Marketing Plan

Strategic Objectives

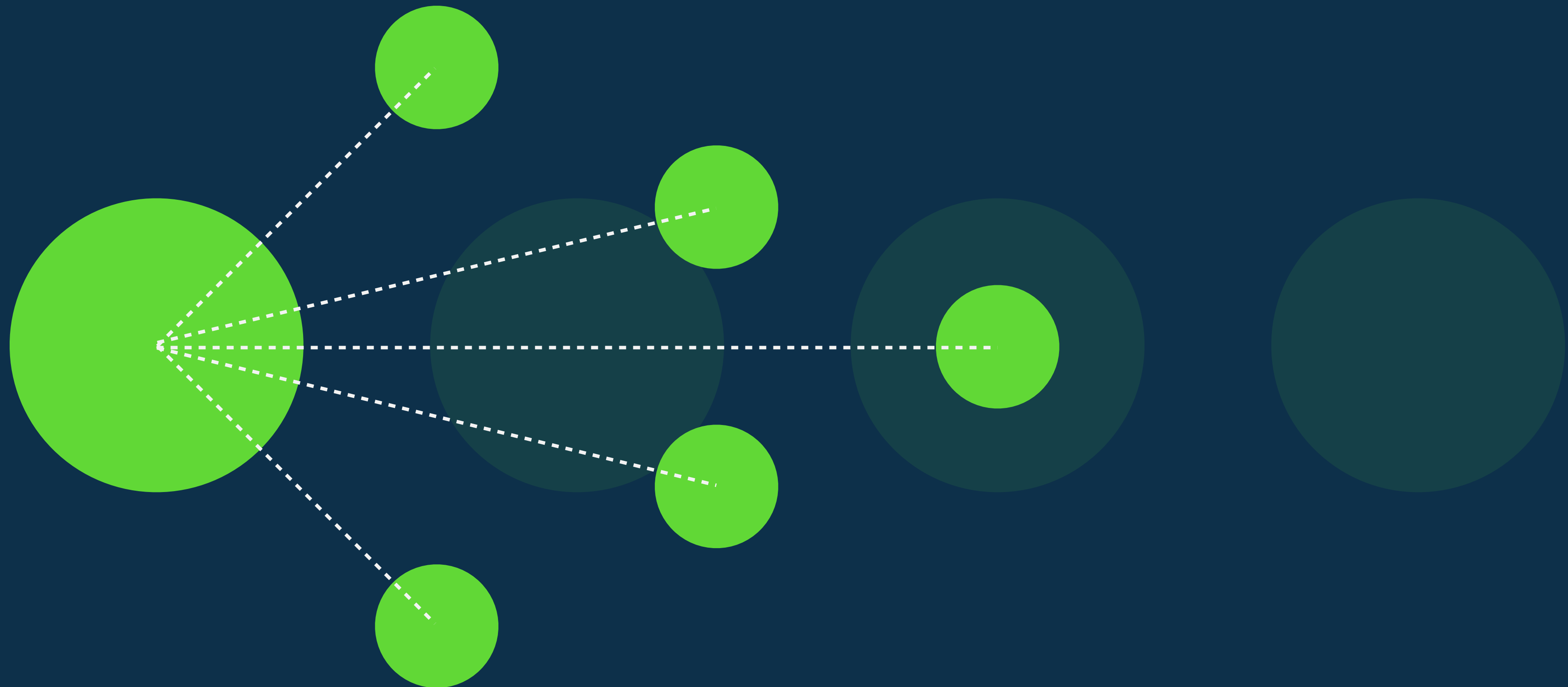
- 1 Client experience and retention
- 2 New client acquisition channels
- 3 Leverage and maximize partnerships
- 4 Build upon existing COI relationships
- 5 Client and prospecting events

Client Acquisition Channels



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Map Out Your Strategy



New Client Acquisition Channels

Partnerships

Partnerships are a key resource to client acquisition for CPC. We will leverage relationships with key strategic partners to get in front of our target demographic. The following initiatives are targeted toward developing these relationships and discovering available opportunities.

CEO Coaching International

- » CPC Strategist and CEO Coach connect monthly (determine appropriate frequency as part of One-Year Planner)
- » Thought leadership content provided to coaches quarterly (email, blog, presentation, video)
- » CPC attendance at all CEOCI events
- » Coaches call spotlights
- » Webinar presentations (determine frequency)
- » Marketing calls to explore additional opportunities for engagement (determine frequency)
- » ROI tracking in Salesforce

Omaha Chamber

- » Events and educational webinars

Centers of Influence (COIs)

The goal of COI relationships is to generate qualified leads through cross referrals and targeted events. The following initiatives are targeted towards developing these relationships.

- » Quarterly co-hosted event or roundtable
- » Quarterly newsletter featuring client/COI wins, how we can partner, testimonials, stakeholder spotlight, COI content or spotlights.
- » Quarterly HH or coffee at Carson – responsibility shared across CPC team
- » Distribute additional SME content by CPC team with COIs
- » Introduction and revenue tracking in Salesforce

» Events and educational webinars

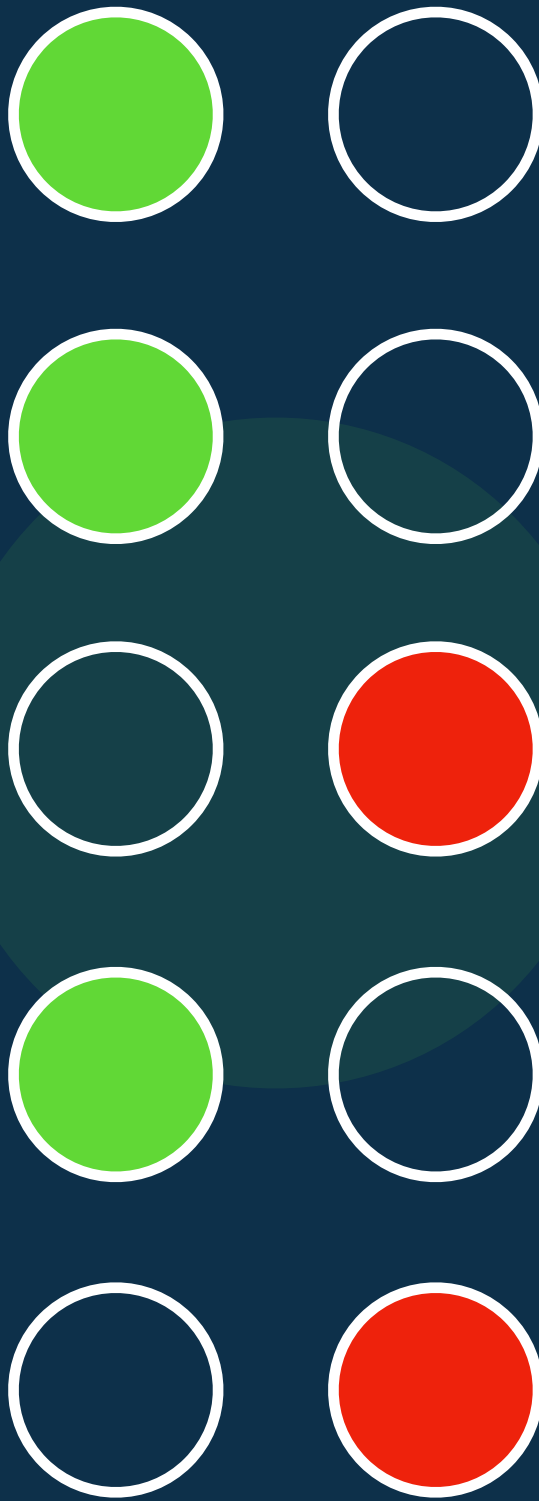
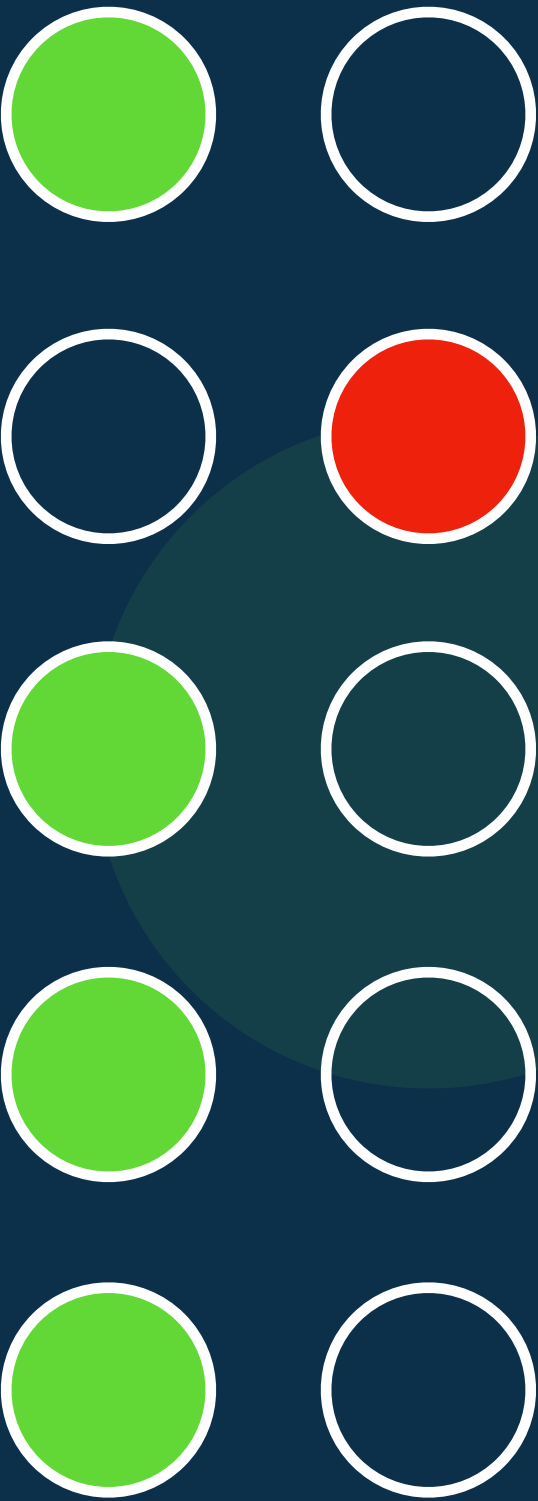
Events

QUARTER	DATE	EVENT	TYPE	COST
Q1	Feb 22-23	CEOCI Napa	Business Development	\$2,500
	March 21	Women's Workshop	Client Appreciation, Business Development	\$5,000
	TBD	Market Outlook	CW	\$400
	Q1 Date TBD	CEO Roundtable (quarterly)	Business Development	\$300
	Q1 Date TBD	COI Coffee / HH (quarterly)	Business Development	\$200
Q2	April 12	Masters	Client Appreciation, Business Development	\$2,500
	April 26-28	CEOCI Annual Summit	Business Development	\$2,500
	April	Advisory Council	Client Experience	\$1,000
	June	CWS Tailgate	Client Appreciation	\$3,500
	Q2 Date TBD	CEO Roundtable (quarterly)	Business Development	\$300
	Q2 Date TBD	COI Coffee / HH (quarterly)	Business Development	\$200
	TBD - Event #1/2	Client Experience + Qualified Introduction	Client Appreciation, Passion Prospecting	\$5-10,000
	TBD - Golf	Golf Hosting	Passion Prospecting, Business Development	\$5,000

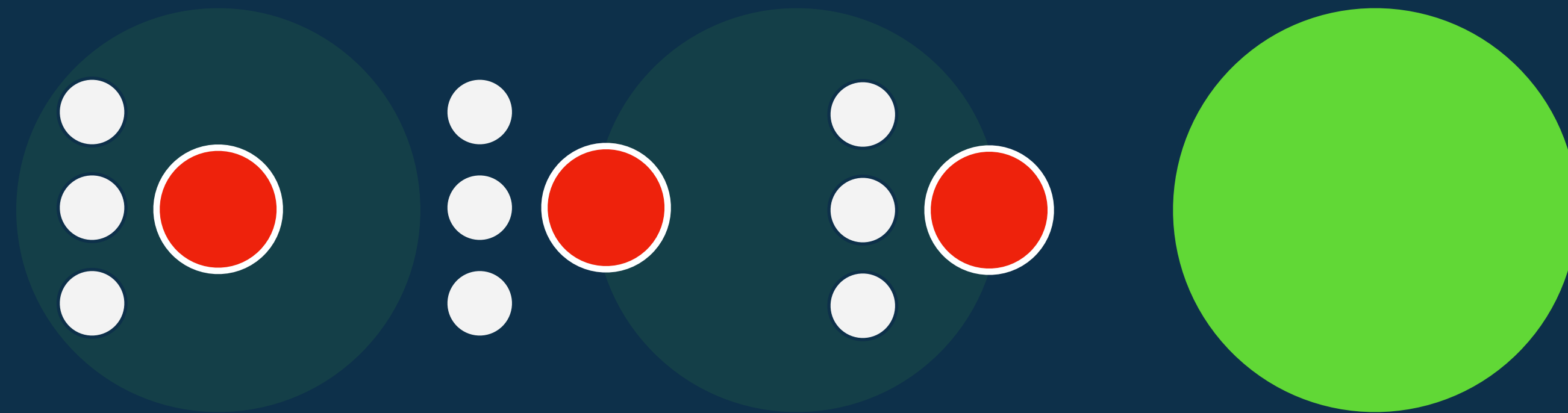
	TBD - Event #1/2	Client Experience + Qualified Introduction	Client Appreciation, Passion Prospecting	\$5-10,000
	TBD - Golf	Golf Hosting	Passion Prospecting, Business Development	\$5,000
Q3	July	Half-time Report	CW	\$500
	Sept 9-11	Excell	Conference	-
	TBD - Event #2/2	Client Experience + Qualified Introduction	Client Appreciation, Passion Prospecting	\$5-10,000
	Q3 Date TBD	CEO Roundtable (quarterly)	Business Development	\$300
	Q3 Date TBD	COI Coffee / HH (quarterly)	Business Development	\$200
	TBD - Golf	Golf Hosting	Passion Prospecting, Business Development	\$5,000
Q4	Oct 17-19	CEOCI Dallas Coaches Meeting	Business Development	\$2,500
	Dec	Holiday Happy Hour	Client Appreciation	\$4,000
	Q4 Date TBD	CEO Roundtable (quarterly)	Business Development	\$300
	Q4 Date TBD	COI Coffee / HH (quarterly)	Business Development	\$200

Recommended Budget: \$56,400

Measure The Outcomes



Review & Raise the Bar



Analyze
Strategize
Adjust

Family Investments

Carson Wealth Strategist



Real Estate Investments

1. Primary Home
2. Multi-Family
3. Single Family
4. Commercial



Private Ownership

1. Operating Business
2. Alternatives
3. Venture Investments



Liquid Assets

1. US Treasuries
2. Fixed Income
3. Equities
4. Tax Advantaged



Giving

1. Donor Advised Fund

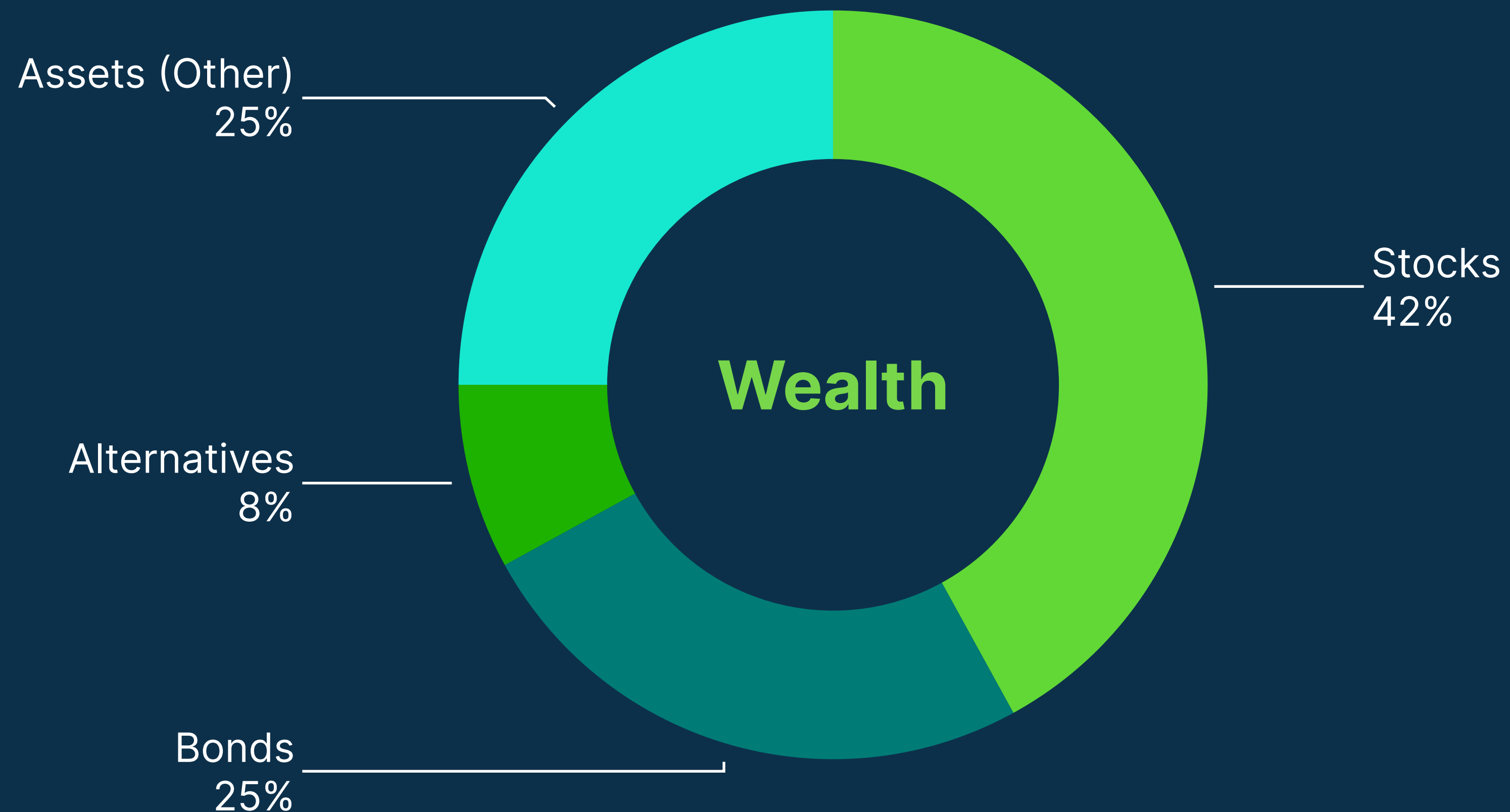


Family

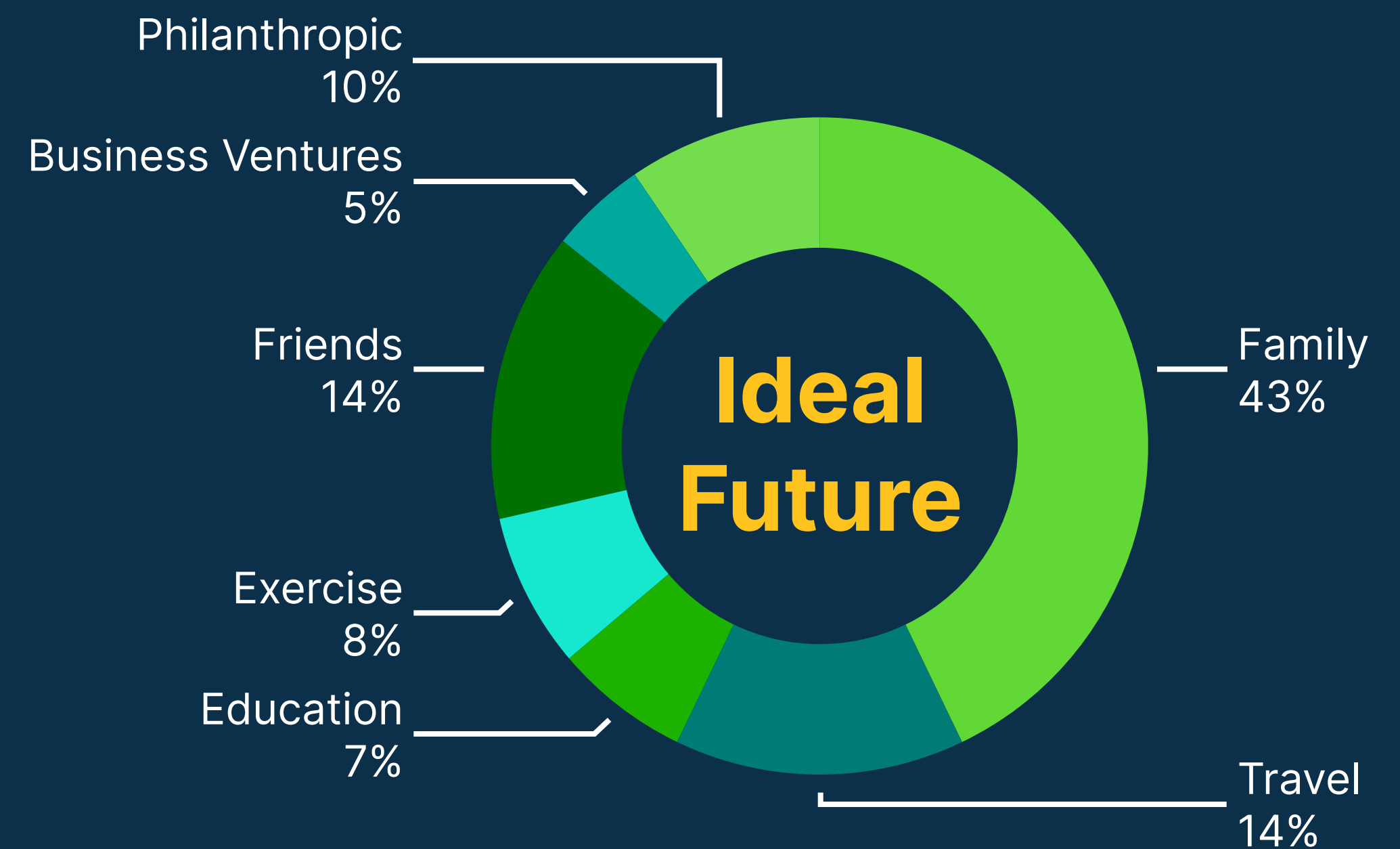
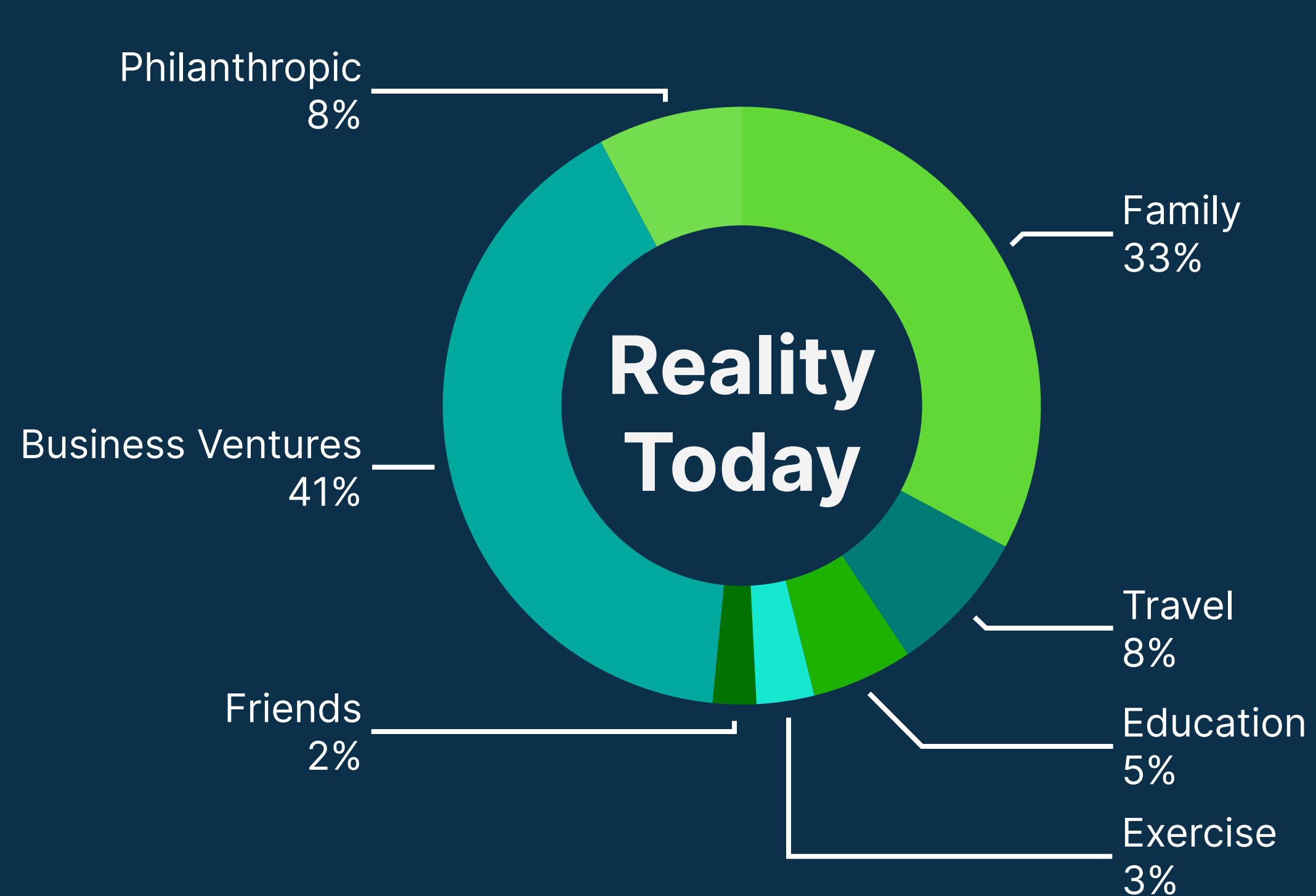
1. Family LP
 2. Education Funding
- Insurance:**
1. Whole Life
 2. Term Life
 3. ILIT



Time Portfolio: A Broader Picture of What Matters



Time Portfolio: Spend More Time Doing What You Love



Review & Raise the Bar

Review Quarterly

Q1

Q2

Q3

Q4

Dashboards & Reporting



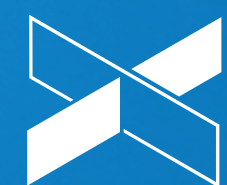
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Existing Client NNA Opportunities - \$30MM

2024 Goal: \$30MM

	7/31/2024	YTD Target (July)	2024 Goal
New Existing Client NNA	\$ 19,717,505.00	\$ 15,000,000.00	\$ 30,000,000.00
New Qualified Client NNA	\$ 71,132,532.00		
Terminated NNA	\$ (21,101,185.00)		

Get Client Feedback



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Raise the Bar





Commitment to Client Satisfaction

Ratings

- Encourage Feedback to Enhance Our Services

Introductions

- Expanding Our Network Through Client Referrals

Created Date	Comments	Assigned	Rating
5/28/24	Did not give specific rating, she gave a lot of praise to Alex and the team for the work we do for her. Explained that she really wanted Andrea and Buck to work with us and knows we are going to do great things for that family. She will always share how great we are with others.	Alex Jensen	9
5/24/24	10, Appreciates putting assumptions to paper just to brainstorm, enjoys that we have these working meetings	Kyle Hatch	9.5
5/21/24	10; we always do a great job, wish he could give us feedback to improve but can?t. We do a great job doing the thinking on his taxes and that is a huge relief for him	Alex Jensen	9.8
5/17/24	Bill: 8 Pam: 9	Alex Jensen	10
5/14/24	10, Appreciates putting assumptions to paper just to brainstorm, enjoys that we have these working meetings	Buck Math	9





Thank You



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