

# Value messaging framework.

A sample value messaging framework using fictional firm, Vested Financial.

## INPUTS

### 1 YOUR IDEAL CLIENT(S)

Dual income families in their 40s and 50s in the Greater Toronto Area. Self-made millionaires with little financial experience. They have not worked with a financial advisor before; may have used an online investing platform or are DIYers.

### 2 THEIR NEEDS.

### YOUR SOLUTIONS.

### SO THAT...

#### Financial needs:

- › Estate planning
- › Stock options
- › Tax optimization
- › Education planning
- › Retirement planning
- › Investment advice

#### Emotional needs:

- › What are we missing?
- › What do we need to do with our kids in mind?
- › Are we on track towards our goals?
- › Too busy, need to delegate

#### Expertise and services:

- › Life planning
- › CFP
- › Retirement planning
- › Tax planning
- › Education planning
- › Coordination with professional partners

#### Your uniques:

- › Was a corporate executive before launching firm
- › Service models that adjust by life phase (fee-based options available)

#### The benefits:

- › Protect future
- › Peace of mind
- › Clarity on how close or far from goals
- › Alignment between partners

### 3 SYNTHESIZE BULLETS INTO SENTENCE(S) TO CAPTURE THE MOST RELEVANT NEEDS, SOLUTIONS, AND BENEFIT

A third-party expert, to review and manage all aspects of their financial situation from education to retirement planning to address the opportunities, gaps and empower their financial confidence.

Full-service wealth management -- financial planning and investment management -- built for your evolving needs. We've been there.

Live fully today.

CONTINUE →



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## OUTPUTS

### YOUR VALUE MESSAGE

Merge your synthesized sentences together, for example:

I/we specialize in [solution] for [ideal client] to [benefit/address need(s)] OR I/we help [ideal client] [benefit] by [solution].

Vested Financial manages all aspects of our clients' financial lives from education and retirement planning to short term goals and investing in your future so you can live more fully today. We specialize in working with dual-income families in their 40s and 50s in the Greater Toronto Area.

OR

Vested Financial specializes in working with dual-income families in their 40s and 50s in the Greater Toronto Area. We manage all aspects of our clients' financial lives from education and retirement planning to short term goals and investing in your future so you can live more fully today.

#### MESSAGING POINT #1: WHAT

- › A full-service wealth manager (financial planning, life planning and investment management)
- › Expertise for mid-to-late career, dual income families
- › Proactively collaborate with all of your professional partners (i.e. accountant, lawyer, etc.)

#### MESSAGING POINT #2: WHY

- › We protect and partner with you to honour you and your family's goals today and in the future so you can live more fully today
- › Fully confident and aligned in your financial situation

#### MESSAGING POINT #3: HOW

- › We proactively manage all aspects of your financial life through our "Fully Vested" Process, a 4-step process to protect and empower your goals through every phase of life (discover, act, monitor, adjust)
- › Fee-based and commission models based on need

#### EVIDENCE.

- › Founder was a corporate executive for 15 years prior to founding Vested Financial
- › Serve over 50 mid-to-late career dual income families
- › Certified Life Planner and CFP

#### EVIDENCE.

- › 98% retention
- › Our clients report the greatest value gained from partnering with Vested Financial is "peace of mind" and "confidence"

#### EVIDENCE.

- › Fully Vested Process™ overview
- › Fully Vested Process™ case study
- › Fully Vested Quarterly Report sample

WELL DONE, GO PUT YOUR VALUE MESSAGING TO WORK



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