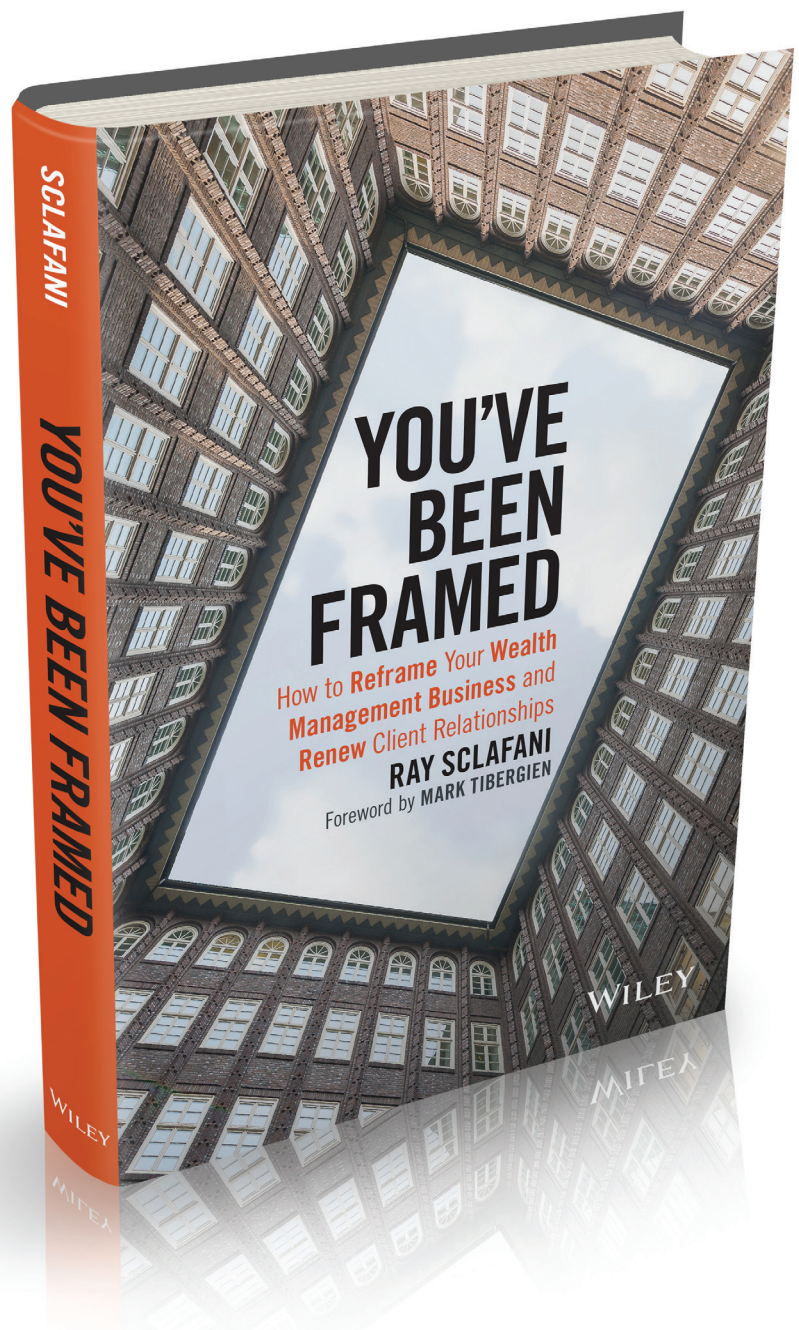


**YOU'VE
BEEN
FRAMED**

8 Steps to Developing the Most Important Marketing Tool of All



GET CLEAR. GET FOCUSED. GET RESULTS.™



Wealth Management Practice Reframes for the Twenty-First Century

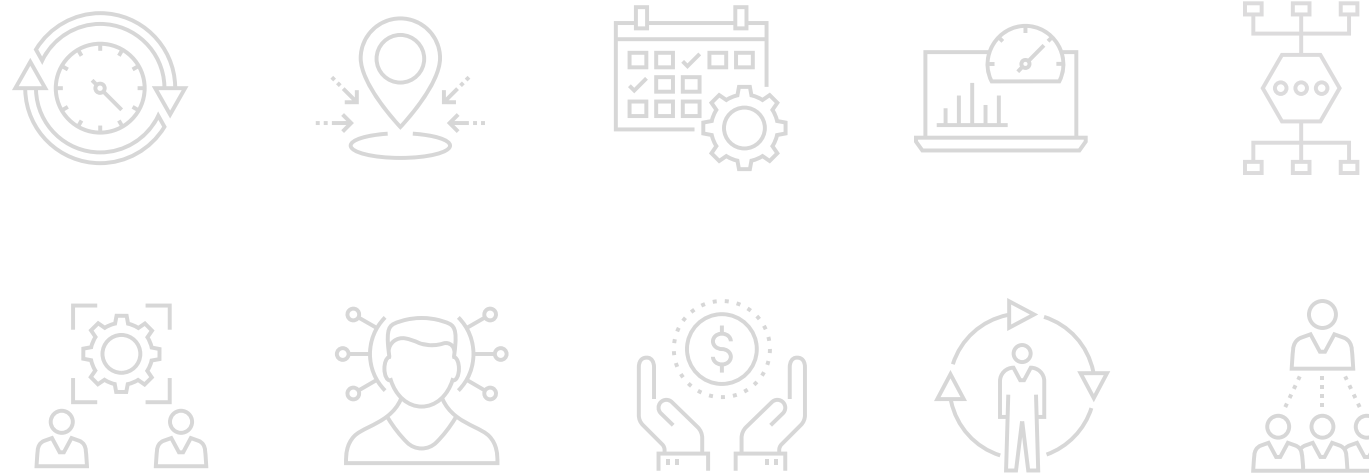
Old Frame		New Frame	
Reframe #1	I provide my clients with one particular financial service.	▶	We provide our clients with comprehensive wealth management that begins with outcomes-based financial planning.
Reframe #2	I sell to my clients.	▶	We partner with our clients.
Reframe #3	I am the best at serving my clients.	▶	Our team is the best at serving our clients.
Reframe #4	I know what is of value to my clients.	▶	Our clients and our team work together to define what value our clients need and what value our team can provide.
Reframe #5	I allow clients to rent my services until I choose to stop practicing.	▶	We build a legacy business that serves multiple generations to come.



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CAPABILITY DECK



Five Uses of the Capability Deck

1. With current clients - “The Re-Frame”

2. With client advocates

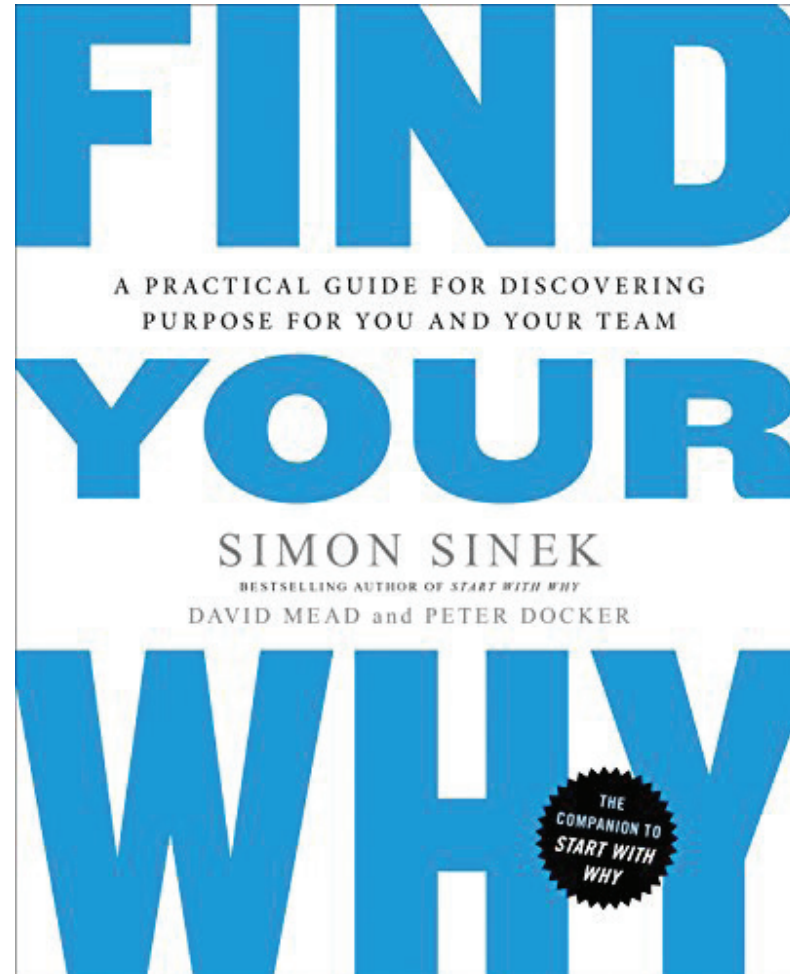
3. With professional advocates and centers of influence

4. With prospective clients

5. With team members

8 Steps to Developing Your Capability Deck

1 Why you do what you do



8 Steps to Developing Your Capability Deck

- 1** Why you do what you do
- 2** Who your firm is built to serve

8 Steps to Developing Your Capability Deck

- 1** Why you do what you do
- 2** Who your firm is built to serve
- 3** Known needs of your ideal client

8 Steps to Developing Your Capability Deck

- 1** Why you do what you do
- 2** Who your firm is built to serve
- 3** Known needs of your ideal client
- 4** Unknown needs of your ideal client

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- 4** Unknown needs of your ideal client
- 5** Solutions, not just “products,” you provide your ideal client

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- 4** Unknown needs of your ideal client
- 5** Solutions, not just “products,” you provide your ideal client
- 6** Your unique, client-outcome oriented wealth management process

8 Steps to Developing Your Capability Deck

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- 4 Unknown needs of your ideal client**
- 5 Solutions, not just “products,” you provide your ideal client**
- 6 Your unique, client-outcome oriented wealth management process**
- 7 Your team of trusted professionals (internal and external)**

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- 6** Your unique, client-outcome oriented wealth management process
- 7** Your team of trusted professionals (internal and external)
- 8** Setting expectations