THE

Masterclass

COACHING LAB FOR FINANCIAL ADVISORS

Powered By

Jumpstart Coaching Lab

Dear Current Financial Professional,

One of the things that most financial professionals struggle with at some point is client acquisition.

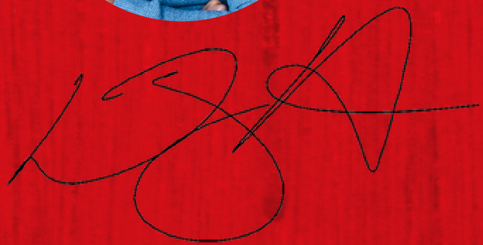
I have a theory as to why this is the case and it isn't answered solely by lead-generation, automated sales funnels, better SEO, or any other gimmicks you're being told about nowadays.

After 20+ years in financial services and countless consultations with financial advisors big and small, I've discovered a commonality...most advisors just want to grow.

Unfortunately, the industry hasn't been the best teacher of how to grow the right way-which is by attracting your ideal client. Working with just anyone in a world where everyone wants a "specialist" is a recipe for failure.

That's what the Masterclass Coaching Lab is here to show you how to do...position yourself as the expert to a group of prospective clients that you will enjoy working with!

If you're interested in creating a personal brand that will help you qualify the type of clients you want to work with, then turn the page!



Dominique Henderson, CFP®

Founder, Jumpstart Coaching Lab

Welcome to the Lab

"[he/she] who wishes to fight must first count the cost"
— Sun Tzu, The Art of War

Step 1

Define Goals & Objectives for Your Practice

If you want to build a successful financial services practice, differentiate yourself from other advisors, or even if you just want to spend time doing the things you love WHILE still serving your clients (profitably), then listen up.

One of the most difficult things you might ever face as you embark on this journey is your own voice and mindset. In my Masterclass Coaching Lab, we will work on the "talk tracks" you are playing in your head that make the difference between SUCCESS or SABOTAGE.

We'll spend time together to find out EVERYTHING you will need to sustain the necessary actions and behaviors to create your "ideal" financial services business.

Why? Because this is the main ingredient to your success. Imagine cooking spaghetti without the pasta. Impossible, right?

You will come away with a clear differentiation between the essential vs. non-essentials that will help you grow your practice.

Together, you and I will identify any and all self-limiting beliefs (SLBs) or sabotaging costs: “cost of comfort”, “cost of just settling”, “cost of ignorance”, “cost of inexperience”, etc. and put tools in place to overcome your SLBs.

Finally, you and I will craft your vision so we can get laser-focused on what you want to accomplish!

Step 2

Strategy and Implementation

After Step 1, we move on to Step 2.

During Strategy and Implementation there are just three stages...

Create.
Implement.
Test and Refine.

1 Create. You and I will work together to find a "niche" of individuals that you can serve at your highest level in order to ensure your success. My proprietary niche builder exercise will help you identify your ideal client-type and create an attractive offer for them.

2 Implement. Next, you and I will create a story and sales process for you to "pull" your ideal client into. It won't be perfect, but that's not the goal--action is though. We'll ensure that you're moving and doing, not just "thinking about it."

3 Test & Refine. Finally, we'll identify what is working and what is not so we can make incremental tweaks to the process and your messaging. Iteration is the game!

You're probably thinking..."*this process is simple*".

You're right. It is SIMPLE, but that's not the same as EASY and that's why so many advisors fail at building the type of practice that THEY want.

That's ok, because you will be different!

Our Process in the Lab

Phase 1 (first 30 days) - Onboarding & Compliance

We'll meet together to discuss your answers/responses to a quick intake form and craft your customized plan. After onboarding, we will immediately get started on the paperwork for your state filing.

Phase 2 (next 2 weeks) - Preparing Your Mind for the Journey

Having started a firm of my own and worked with dozens of advisors I know the mentality it will take to be successful. We'll dive into several areas so we can get on the same page of the time, effort and energy you'll need to make this successful.

Phase 3 (next 2 weeks) - Building Your Client Avatar

Since there is no firm if you don't have clients, this phase of work will allow us to construct your client avatar. Who are they? Where do they work and play? What are their goals and aspirations in life? All of this we'll flesh out so that we build a description of the person you want to serve in your practice.

Phase 4 (next 30 days) - Developing Your Offer & Marketing Strategy

Next we will develop your offer and your marketing strategy which means the services you'll be offering to prospective clients. Also, we'll build a strategy/plan for which platforms you will show up on and what you will say/how you will say it when on those platforms.

Phase 5 (next 2 weeks) - Establishing a Scalable Workflow and Effective Techstack

This is where we'll tackle developing a workflow that is scalable for you to handle bringing on new clients without you hiring a lot of people. We'll develop a workflow that suits your particular superpower and outsources the rest with automation from initial prospect appointment to client onboarding.

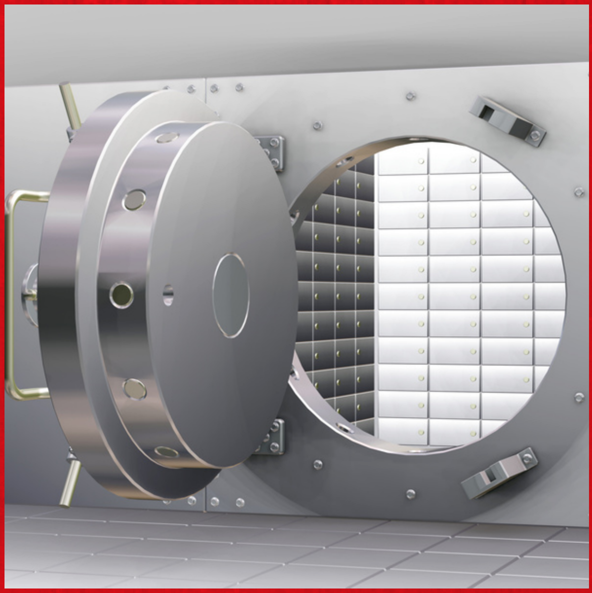
Phase 6 (next 4 weeks) - Coming Out Party...Launch of Website + Social Media Campaign

This phase is all about your launch. We'll deploy a strategy that consists of the right email sequences, videos, live events or combination of them to help you create some buzz around your firm's launch to start attracting your ideal client.

Ongoing coaching support beyond this point is available upon request.

While working together, your benefits include...

Access to "The Vault" of
(Swipe Files, Email Scripts, Sales Funnels)



1-on-1 Consultations

Niche Builder &
12 Week Action Plan

Access to project management tool

ClickUp

Content for Your Personal Brand

CLICK HERE to complete and application.

THE

Masterclass

COACHING LAB FOR FINANCIAL ADVISORS

Powered By

Jumpstart Coaching Lab