

# HNW Prospecting

A Clear Strategy for the Ultimate Niche



**David Baker**

Financial Advisor @ Phoenix Private Wealth

# The Strategic Partner Ecosystem

How Our Marketing Engine Builds Professional Partnerships

# Why Strategic Partnerships Work



## Help Clients Win

Partners will refer and work with you if they know that their clients will win. Many have been burned in the past.



## Help Partners Win

Partners stay engaged when you make them look good. You can do this without asking for anything back.



## Value Exchange

Referrals are an outcome of an ongoing value-exchange system. This isn't a one-off ask.

# Why Strategic Partnerships Work

**“People don’t care what you know until they know that you care.”**

# Our Key Branding

## WHO WE SPECIALIZE IN SERVING

We look for those dealing with complex financial planning. Really targeting \$1.5M or more. They are business owners and great savers primarily.

## HOUSEHOLD CFO POSITIONING

We position as the client's household CFO. We are NOT the "Investment Guy"

## INTEGRATED PROCESSES

This clear positioning reduces partner risk and increases confidence in introductions. Investment sales-people are a time a dozen. This positioning changes the narrative and reassures partners that their clients will be properly cared for.



**PHOENIX**  
PRIVATE WEALTH

# Our Channel Map



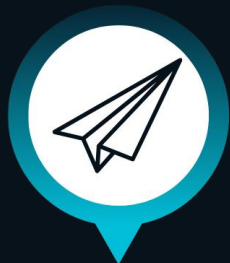
## Online Branding & Communication

### Social Media

- Posted Daily
- Attention Seeking

### Podcast

- Multiple Episodes
- Monthly Theme
- Discussion Style



## Email Marketing

- 30,000 Contacts
- 4 to 6 Emails/Month
- Topical

### Custom Video Messaging



## Tangibles

- Monthly Drip
- Gifting Strategies



## Partner Meetings

- One-to-one Meetings
- Interviews vs. pitches
- Ongoing work

# The Phoenix Private Wealth Team



**David Baker**  
Managing Partner



**Ken Handy**  
Managing Partner



**Kevin Cook**  
Partner, Financial Advisor



**Connor Howes**  
Financial Advisor



**Raquel Casciari**  
Executive Assistant &  
Service Associate



**Greg Foster**  
Client Engagement &  
Marketing Director

# Custom Video Messaging



# Podcasting

- Thought Leadership
- Partner Platform
- Content Creation



# Gifting Strategies

## PERSONALIZED

Every gift is tied to client preferences or life events.

## SIZE OVER COST

As the Ferguson Group taught, the size of the gift can often matter more than the cost. Favorite snacks and flowers.

## PARTNERS

Partners receive the same gifting process to surprise and signal we pay attention.

## EMPOWER

The advisor doesn't have to be involved in every gift.



# Partnership Workflow

*(Repeatable)*



# What We Offer Partners

## ■ Educational Content

Materials, Letters, Emails, and Videos they can share.

## ■ Coaching

We offer marketing coaching and systems advice.

## ■ Co-Marketing Opportunities

Webinars, seminars, and joint events.



## ■ Client Experience

We act as household CFO and coordinate across all planning areas, sending business back to our partners.

## ■ Nurture System

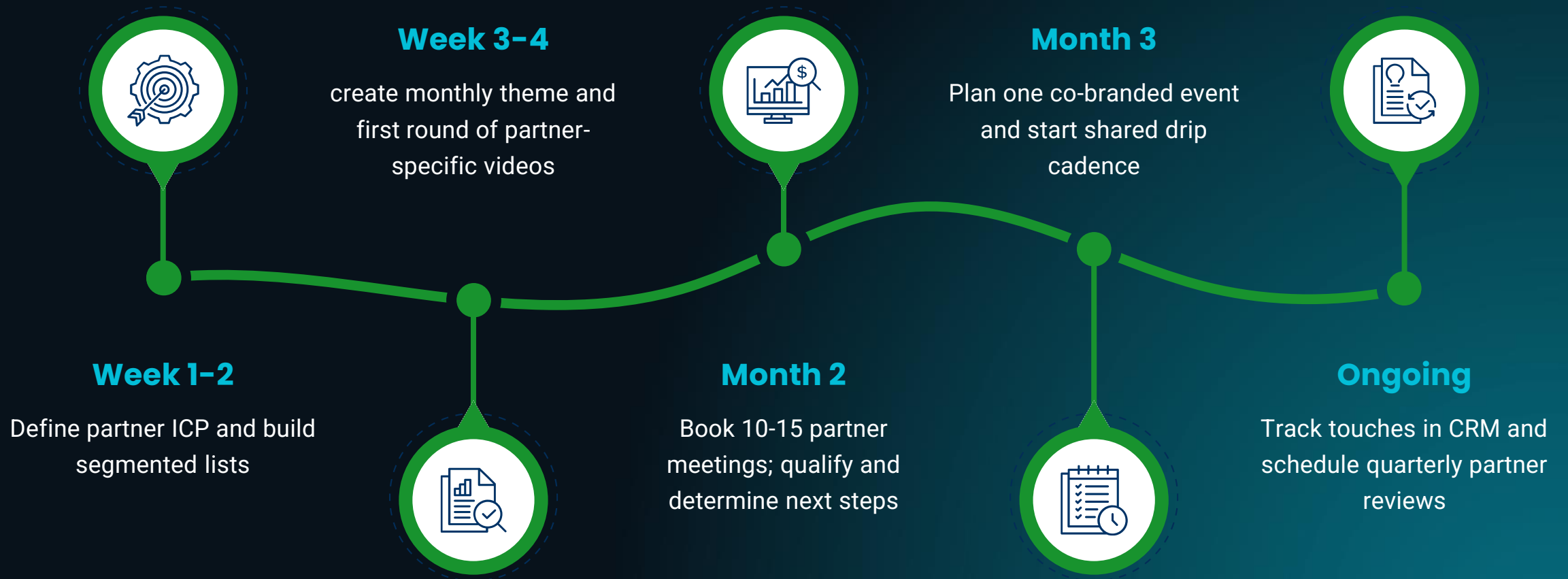
Their introductions are taken care of consistently and predictably.

# Partner Segments

## Messaging Themes



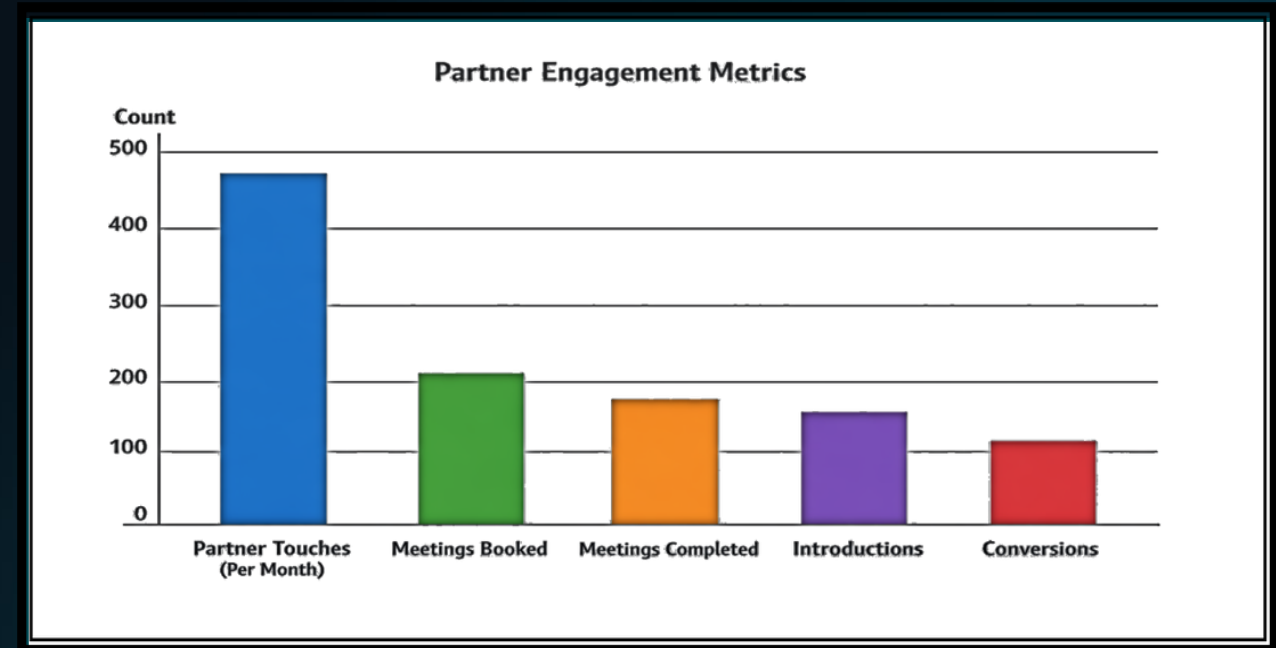
# 90 Day Implementation



# Metrics to Track

*(So it's Not "Hope" Marketing)*

- # Partner Touches (by segment)
- # Partner Meetings Booked/Completed
- # Introductions Received and Conversion Rate
- AUM/Revenue attributable to partner channel
- Partner Satisfaction: Efficiency, Communication, and Client Outcomes



# Questions?

Please **raise your hand** and wait for the microphone to be brought to you **before** asking your question.





# NASHVILLE

★ TENNESSEE ★

“FORCE MULTIPLIERS”