Value Messaging Worksheet

Complete this worksheet to uncover and organize the key components of your value messaging

IDEAL CLIENT NEEDS	SOLUTIONS & BENEFITS	VALUES & APPROACH
______________________________	______________________________	______________________________
______________________________	______________________________	______________________________
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VALUE MESSAGE	Formula = [High-Level Benefit] + [High-Level Need(s)/Challenges(s)] + [How You Empower To Overcome]		
KEY SUPPORTING MESSAGES			
PROOF POINTS	1. 2. 3.	1. 2. 3.	1. 2. 3.

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IDEAL CLIENT NEEDS	SOLUTIONS & BENEFITS	VALUES & APPROACH
To make a significant professional transition. Security, peace of mind and confidence. Risk management. A proactive partner they trust.	Transition planning for business owners and late-career professionals. Planning and investment management to prepare for and derisk change.	To be go-to person for all financial decisions. Proprietary Transition Readiness Process. 25 years of experience.

VALUE MESSAGE	Formula = [High-Level Benefit] + [High-Level Need(s)/Challenges(s)] + [How You Empower To Overcome] Take the leap with confidence. Transitions can be daunting, make progress towards your goals with an experienced financial partner and transition readiness process.		
KEY SUPPORTING MESSAGES	PROTECT what you have with a financial and investment plan	PREPARE with a proven transition readiness process	PARTNER with a transition expert, specialized in working with business owners, pre-retires and retirees
PROOF POINTS	1. An initial in-depth review of your financial situation, receive a detailed financial plan 2. As CFPs, we are experts in retirement, tax, education, estate and cash flow planning 3. Team committed to monitoring and managing your financial situation, receive an updated plan annually and quarterly check ins	1. Using the Transition Readiness Process for over 20 years 2. Receive a scorecard to inform likelihood of success with areas to address 3. We partner with you to address any areas of concern to help you transition with confidence	1. 25 years experience as an advisor 2. Worked with 100+ business owners through business and retirement transitions 3. Certified Financial Planner