

Practice Development Series

Module 2: Marketing / Activity 1 – Defining Your Value Proposition

Aligned with the PFA™ Designation Program

Instructions: Begin to create your value proposition by following the two-step process and answering the questions in the template below.

Note: You can create section headings in your completed activity to represent each topic area.

Defining Your Value Proposition
Step 1 – Define Your Audience
1. Who are you trying to communicate with? Name the target client you wish to attract.
2. What interests them? State what they need to know and why. Think of their pain points or concerns.
3. Give a compelling reason why they should choose you. Explain why or how you can help them.



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Defining Your Value Proposition
Step 2 – Prepare Your Value Proposition
Value Proposition - Draft statements:
 Draft # 1
 Draft # 2
 Draft # 3

To help you get started, here are a few examples of value propositions used by financial advisors:

"I provide wealth management services that help clients reduce taxes, reduce the fear of financial loss, and retire comfortably."

"I enable individuals to make more informed decisions about their money and the growth and protection of their assets and estate."

"I offer customized investment strategies and give clients the greatest chance of reaching their financial goals."

"I offer comprehensive, objective financial advice to clients who desire a high-level of personal service."

"The goal of my practice is to work with my clients to help them identify their dreams and goals, and then partner with them to understand the financial implications of the life decisions they make."

"We believe in our clients' ability to make their own decisions about the financial aspects of their lives, and feel we can best serve them by giving them the benefit of our experience and expertise."

