

Practice Development Series

Module 2: Marketing / Activity 2 – Creating an Elevator Speech

Aligned with the PFA™ Designation Program

Instructions: Create a quick elevator speech you can use when you meet a target prospective client by answering the questions in the template that follows. Once you have answered the questions, create a short statement by combining several of your answers ensuring the final statement aligns with your value proposition, as defined in activity 2.1.

Here is how it could work. If, in Question 3, you identified that you want to work with business owners, and in Question 5, you identified the struggles that business owners have developing personal financial plans, your elevator speech might look something like this:

“Most business owners that I know work very hard to make their businesses successful. In many instances, they don’t take the time to do the same thing for their personal finances. I help business owners to take the time to separate the two, and make sure that they have something waiting for them when it’s time to slow down.”

Practice it on a spouse or colleagues. Ask them to repeat it to you. How much were they able to remember? Do you need to make revisions to make it shorter, crisper or more compelling?

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

Quick Elevator Speech	
Question	Advisor Response
1. Why did you go into this business?	



Practice Development Series

Module 2: Marketing / Activity 2 – Creating an Elevator Speech

Aligned with the PFA™ Designation Program

Quick Elevator Speech	
Question	Advisor Response
2. What specifically do you enjoy doing?	
3. Who do you want to work with?	
4. What is the gap in the industry or a problem people are facing that you are able to address?	
5. What are some financial concerns you are really good at helping people with?	
6. Give an example of how you were able to help a client.	



Practice Development Series

Module 2: Marketing / Activity 2 – Creating an Elevator Speech

Aligned with the PFA™ Designation Program

Quick Elevator Speech

Draft #1

Draft #2

Draft #3

