

**Build Your Brand**  
by  
Barbara Kay Coaching

**Exercise 1: *What's Most Important to your Clients?***

Write down the specific words (adjectives & descriptors) that you hear from your best/ideal clients about you and what they value.

What are the themes that you hear across clients?

**Exercise 2: *What will Attract Clients that will Value You and You will Value?***

Write 2 - 5 things that differentiate you from other wealth management professionals. Use the following topic areas to help identify areas where you are unique.

- Unique position in the marketplace
- Client groups you focus on
- How you serve clients
- COI's you work with
- Interests/hobbies/clubs
- Specialized skills/certifications
- Personal story/background
- Passions/values

**Uniqueness:**

- 1.
- 2.
- 3.
- 4.
- 5.



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**Exercise 3: *How to be Most Memorable?***

Look at:

- ✓ Adjectives you wrote down in exercise #1: *What's Most Important to your Clients?*
- ✓ The 2 - 5 differentiators listed in exercise #2: *What will Attract Clients that will Value You and You will Value?*
- ✓ Compare these to what you normally say to clients & prospects. Are you sending a message that resonates best? Is it a clear, compelling & memorable based on what clients value and what makes you different? Are you living out the message that you deliver?
- ✓ Use the space below to further refine your brand

**Your Brand:** *How People will Know Who I Am, What I Stand for & What they will Experience?*

**Why/Purpose:** What is your purpose & drive? What do you want clients to experience?

**Who** you serve:. Who do you want to like you & work with you?

**What** you do & deliver for clients:

**Uniqueness:** How are you different from other professionals? Why you?

Sum that up with 1-2 sentences using concrete words that evoke mental pictures of real things or real life-experiences.

