



CREATING YOUR UNIQUE VALUE PROPOSITION

How to Define Yourself and
Stand Out in Your Marketplace



Part of Securities America's Business Mastery Series

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Your Tasks

1. Complete the unique value proposition worksheet.
2. Complete the practice building exercise.
3. Determine your unique value proposition.
4. Formulate your unique value proposition into a 3-3-3 speech format.
5. Introduce your 3-3-3 speech to your staff and prospective clients.

Introduction

As a financial professional, one of your most important tasks is to find a way to “stand out” — to differentiate yourself from others in your profession. One of the best ways to do this is by creating your own Unique Value Proposition (UVP). Your UVP should be based on the special benefits you offer, and your unique traits, characteristics or accomplishments. A UVP expresses how you wish to be perceived. It is the core message you want to deliver in every communication medium. A well-crafted positioning statement defines your company’s direction.

A UVP answers seven essential questions:

1. Who are you?
2. What business are you in?
3. Who do you serve?
4. What are the needs of the market you serve?
5. Who is your competition?
6. What is different about your business?
7. What unique benefit is derived from your product or service?

Some important things to keep in mind about UVPs are:

- You may have to do some soul searching to answer the seven essential questions completely and accurately.
- Allow yourself ample time to draft your UVP — it may take multiple revisions to clearly define your position.

- A UVP can be as short as a few words or as long as two sentences. In most cases, the shorter the better.
- Claim ownership of the UVP and it will become your brand.
- You can change your UVP if you have outgrown your old UVP or if you are developing a new specialty.

Finally, while there is much flexibility in creating your UVP, there are mistakes to avoid.

- Do not spend a great deal of money on expensive marketing materials to promote your UVP until you are sure it absolutely fits you.
- Do not have fluff in your UVP.
- Do not make your UVP overly emotional.
- Be restrained in the use of superlatives.
- Don't make claims in your UVP that could get you into compliance trouble.
- Don't ignore your specialization.

The best way to create a UVP is to simply get started. The following worksheets will help you answer the essential questions for developing your unique selling proposition and formatting it into a 3-3-3 speech format so you can easily deliver your UVP.

STEP 1: Complete the Unique Value Proposition Worksheet

1. What makes you unique as a financial advisor?

2. What makes you stand out as a financial advisor?

3. What distinguishes you from other financial advisors in your geographical area?

4. What are you most excited or passionate about in your financial business?

Why should a high net worth individual or family hire you as their financial planner?
(Try to list at least five reasons.)

1.

2.

3.

4.

5.

5. Do you have any special degrees or designations?

STEP 2: Complete the Practice Building Exercise

Think back over your career. What are your ten greatest accomplishments as a financial advisor? Name specific examples where you helped clients pursue their goals.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

STEP 3: Determine Your Unique Value Proposition

Analyze your answers from the UVP worksheet and the practice building exercise. Do you notice any patterns? This might be the heart of your UVP.

Unique Value Proposition Samples

Here are a few ideas on how to get started defining your business.

- We help clients plan to make the most of their money in their retirement years.
- We specialize in helping small business owners with all aspects of their finances.
- We help women executives invest for their retirement.
- We help executives maximize their employee benefits for a sound financial future.
- We strive to make your financial dreams a reality.
- We provide tailored financial plans for non-traditional families.
- We help families reach for their financial dreams.
- We specialize in multi-generational wealth planning.
- We are committed to life-long financial planning for executives and professionals.
- We specialize in comprehensive financial planning for pre-retirees.
- Supporting your financial dreams, enriching your financial future.
- Professional financial guidance for teachers and educators.
- Providing financial solutions for pre-retired and retired credit union employees.
- We strive to be your trusted advisor for investment and insurance solutions.
- Specializing in retirement plan rollovers.
- We help create and preserve multi-generation wealth.
- Providing creative solutions to your complex financial needs.
- Financial Planning to improve the quality of your life.
- We help small business owners organize their finances and make smart money decisions.
- We help people nearing retirement create an organized and diversified portfolio to carry them through their next life stage.
- We are financial coaches for people interested in living a life of abundance.
- We help pre-retirees identify what is important in their lives, prioritize their goals and organize their finances to achieve those goals.
- Helping people plan for the financial and emotional implications of one of the biggest transitions they will ever experience, retirement.

Sample Unique Value Proposition Translated to a Screening Statement

“My clients are blue collar employees of manufacturing firms or service providers — and they’re concerned about:

1. Protecting what they’ve saved.
2. Knowing where to invest what they’ve accumulated.
3. Having a guide that will be there to keep working on #1 & #2 as they transition to retirement.”

So... “I help clients protect and grow what they’ve saved, invest their money where it makes sense, and guide them on their journey through retirement.”

Sample 3 Second Taglines that Attract Ideal Clients

- We help successful Boeing executives align their wealth with their values and intentions.
- We help medical professionals in south Denver navigate the complexities of living well.
- We work with suddenly single women in transition and empower them in the areas of money and relationships.

Advisor Examples

1. 3 Second Tagline

I prepare school administrators to run their retirement with confidence.

30 Second Introduction

I help north Jersey School administrators prepare for their ideal retirement. I help them maximize their pension payouts while considering their beneficiaries’ needs. I educate and guide them through Social Security options for their second fixed income. Finally, I manage their remaining assets to bridge the gaps between their fixed income options and the lifestyle they desire.

2. 3 Second Tagline

I bring strategy and organization through the financial guidance I provide, especially as people go through life’s transitions.

30 Second Introduction

I’m part of a team of financial advisors at The Professional Advisor Group. As an independent firm, we specialize in bringing the complex world of wealth management to a level where an efficient and effective plan can be implemented. We share a philosophy of first understanding the whole picture of a client’s financial life, and then

move forward with reliable strategies to help our clients. The entire process brings organization, understanding and ease to people’s financial lives. Clients gain a sense of control as they go through significant life transitions.

3 Minute Pitch

Most of my clients have already accumulated a fair amount of assets and as they approach retirement they realize the rules of the game change as they shift from accumulation goals to income goals. (Here, the advisor continues with a unique story of how they helped a client develop their goals. Do not include actual client names, performance or results because this would be a prohibited testimonial.)

Create Your 3-3-3 Speech

3 Second Tagline: who you are and who you serve

Your tagline should motivate the listener to ask “How do you do that?” or “Tell me more.”

30 Second Introduction: overview including listener (ideal client) benefits

3. _____

4. _____

5. _____

How many ways can you use your UVP and 3-3-3 speech to market your practice to your prospective clients?

1. _____

2. _____

3. _____

4. _____

5. _____



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