

Specialty Marketing with your AIF Designation

Glen R. Bayless, AWM, AIF
Member, RBC Sports Professionals Group

My Experience

- Financial Advisor, 20+ years
- Financial Commentator, ABC News
 - Radio Talk Show Host
- Top Producer, consecutively since 1995
- Working extensively with Professional Athletes,
10+ years
- Presentations to Team USA, IIHF Men's Worlds,
NHL Coaches Association, NHL and NFL Pro Player
Camps, and Agent Seminars

What Professional Athletes, Entertainers, and HNW Individuals Look For When Selecting a Financial Advisor

- Trust

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- Knowledge

What Professional Athletes, Entertainers, and HNW Individuals Look For When Selecting a Financial Advisor

- Trust
- Experience
- Knowledge
- Dedication to Exemplary Service

However, they also want

Something Different!

Something Unique!

Someone Like YOU!

What Sets You Apart

- AIF Designation
- Expertise in a Specific Area
- Being “One of Them”

How, Specifically, Your AIF Separates You From The Rest

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 - Client's Needs First

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 - Stewardship

Definition of “Stewardship”

stew· ard· ship

stü-ərd-ship

The conducting, supervising, or managing of something; especially: the careful and responsible management of something entrusted to one's care.

-Merriam-Webster Dictionary

How, Specifically, Your AIF Separates You From The Rest

- Most don't know what an AIF Designation is. Use to your advantage.
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 - Client's Needs First
 - Stewardship
 - Fiduciary Responsibility

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 - Fiduciary Responsibility
 - Able to Demonstrate Reliable, Fixed Standards

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 - Utilize a Process, for everything

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- It's ALL about Trust
 - Client's Needs First
 - Stewardship
 - Fiduciary Responsibility
 - Able to Demonstrate Reliable, Fixed Standards
 - Utilize a Process, for everything
 - Leave Nothing to Chance

How, Specifically, Your AIF Separates You From The Rest

- Having an AIF Designation Sets the Tone.

How, Specifically, Your AIF Separates You From The Rest

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- Let your AIF Designation define you.
 - Someone Better

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- Let your AIF Designation define you.
 - Someone Better
 - Someone in whom they can trust.

How, Specifically, Your AIF Separates You From The Rest

- Use the 4-Step Process In All You Do.

How, Specifically, Your AIF Separates You From The Rest

- Use the 4-Step Process In All You Do.
 - Organize

How, Specifically, Your AIF Separates You From The Rest

- Use the 4-Step Process In All You Do.
 - Organize
 - Formalize

How, Specifically, Your AIF Separates You From The Rest

- Use the 4-Step Process In All You Do.
 - Organize
 - Formalize
 - Implement

How, Specifically, Your AIF Separates You From The Rest

- Use the 4-Step Process In All You Do.
 - Organize
 - Formalize
 - Implement
 - Monitor

Truly Being a Fiduciary

"It's Not Only About The Investments"

- Saying "No" Early and Often.
 - Business Manager, Agents

Truly Being a Fiduciary

"It's Not Only About The Investments"

- Saying "No" Early and Often.
 - Business Manager, Agents
- Saying "No" to Your Clients
 - Being Brutally Honest
 - Being a Sounding Board

Truly Being a Fiduciary

"It's Not Only About The Investments"

- Saying "No" to Small Accounts
 - Minor League Players

Truly Being a Fiduciary

"It's Not Only About The Investments"

- Saying "No" to Small Accounts
 - Minor League Players
- Saying "No" to Friends, Family and Charities.
 - Athlete says yes.
 - I say, "Send me a business plan" or simply "NO".

Helping Clients

"Even when you're not getting paid to do so"

- Psychologically
 - Personal Issues

Helping Clients

"Even when you're not getting paid to do so"

- Psychologically
 - Personal Issues
- Emotionally
 - Slumps, Reducing Stress

Helping Clients

"Even when you're not getting paid to do so"

- Psychologically
 - Personal Issues
- Emotionally
 - Slumps, Reducing Stress
- Sounding Board
 - Being a Good Listener

Helping Clients

"Even when you're not getting paid to do so"

- Be Available
 - Take Their Calls.
 - Answer Their Emails.

Helping Clients

"Even when you're not getting paid to do so"

- Be Available
 - Take Their Calls.
 - Answer Their Emails.
- Be a Mentor – Not Their Friend

Helping Clients

"Even when you're not getting paid to do so"

- Be Available
 - Take Their Calls.
 - Answer Their Emails.
- Be a Mentor – Not Their Friend
- And, above all, be 100% honest, even when it's difficult.

Be Careful!

- Don't Go Too Far!
 - Picking Up Laundry

Be Careful!

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 - Picking Up Laundry
 - Walking The Dog

Be Careful!

- Don't Go Too Far!
 - Picking Up Laundry
 - Walking The Dog
 - Checking on the House

Be Careful!

- Don't Go Too Far!
 - Picking Up Laundry
 - Walking The Dog
 - Checking on the House
- This Really Happens.
 - Know where "Professionalism" Ends.

Glen's 20 Top Tips To Get You Into These "Circles"

1. Be Honest With Yourself

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2. Focus on 1 or 2 Unique Features That You Offer

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3. Help Your Audience To Know Why You're Different

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4. Create Professional Marketing Materials
5. Create A Bio Sheet

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6. Have a Good Web Presence

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7. Brand Yourself

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8. Know Your Target Audience

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8. Know Your Target Audience

9. Build References Into Your Marketing
Materials

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Materials

10. Have Systems In Place

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11. Offer Wholistic Service

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11. Offer Wholistic Service

12. Become An Expert

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11. Offer Wholistic Service

12. Become An Expert

13. Pick Up The Phone

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13. Pick Up The Phone

14. Speak Their Language

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15. Get Referrals

Glen's 20 Top Tips To Get You Into These "Circles"

16. Avoid Fandom

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16. Avoid Fandom

17. Be Memorable

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16. Avoid Fandom

17. Be Memorable

18. Be Willing To Travel

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16. Avoid Fandom

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18. Be Willing To Travel

19. Contact, Contact, CONTACT!

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16. Avoid Fandom

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19. Contact, Contact, CONTACT!

20. Remember, Only YOU have YOU!

Wrap-Up

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- Let Others Know What AIF Is And Why It's Important To Them

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- Follow The Tenants – Stick With Your Process
- Be The Advisor They Need You To Be
- Let Others Know What AIF Is And Why It's Important To Them
- Jump In. With Both Feet.

Thank You!

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For the Professional Athlete



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