

Value Messaging Framework.

Need help? Watch the [develop strong messaging](#) lesson.

Use this two-page tool to plan, create, and organize your value messaging. Once completed share with your team and use the [Value Messaging Activation Checklist](#) to implement and update your messaging for consistency.

INPUTS

1 YOUR IDEAL CLIENT(S)

2 THEIR NEEDS.

YOUR SOLUTIONS.

SO THAT...

Financial Needs:

Emotional Needs:

Expertise & Services:

Your Uniques:

The Benefits:

3 SYNTHESIZE BULLETS INTO SENTENCE(S) TO CAPTURE THE MOST RELEVANT NEEDS, SOLUTIONS, AND BENEFIT

CONTINUE →



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Value Messaging Framework.

Build flexible value messaging, which you can expand and contract as needed while consistently highlighting the same key points.

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OUTPUTS

YOUR VALUE MESSAGE

Merge your synthesized sentences together, for example:
I/we specialize in [solution] for [ideal client] to [benefit/address need(s)] OR I/we help [ideal client] [benefit] by [solution].

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MESSAGING POINT #1: WHAT

MESSAGING POINT #2: WHY

MESSAGING POINT #3: HOW

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EVIDENCE.

EVIDENCE.

EVIDENCE.

WELL DONE, GO PUT YOUR VALUE MESSAGING TO WORK!



Value Messaging Framework.

A sample value messaging framework using fictional firm, Vested Financial.

INPUTS

1 YOUR IDEAL CLIENT(S)

Dual income families in their 40s and 50s in the Philadelphia area. Self-made millionaires with little financial experience. They have not worked with a financial advisor before, may have used a robo service or are DIYers.

2 THEIR NEEDS.

YOUR SOLUTIONS.

SO THAT...

Financial Needs:

- › Estate planning
- › Stock options
- › Tax optimization
- › Education planning
- › Retirement planning
- › Investment advice

Emotional Needs:

- › What are we missing?
- › What do we need to do with our kids in mind?
- › Are we on track towards our goals?
- › Too busy, need to delegate

Expertise & Services:

- › Life planning
- › CFP
- › Retirement planning
- › Tax planning
- › Education planning
- › Coordination with professional partners

Your Uniques:

- › Was a corporate executive before launching firm
- › Service models that adjust by life phase (subscription and fee-based models)

The Benefits:

- › Protect future
- › Peace of mind
- › Clarity on how close (or far) from goals
- › Alignment between partners

3 SYNTHESIZE BULLETS INTO SENTENCE(S) TO CAPTURE THE MOST RELEVANT NEEDS, SOLUTIONS, AND BENEFIT

A third-party expert, to review and manage all aspects of their financial situation from education to retirement planning to address the opportunities, gaps and empower their financial confidence.

Full-service wealth management -- financial planning and investment management -- built for your evolving needs. We've been there.

Live fully today.

CONTINUE →



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OUTPUTS

YOUR VALUE MESSAGE

Merge your synthesized sentences together, for example:

I/we specialize in [solution] for [ideal client] to [benefit/address need(s)] OR I/we help [ideal client] [benefit] by [solution].

Vested Financial manages all aspects of our clients' financial lives from planning for education and retirement to making sure money questions don't stale your dream vacation, to investing so you can live fully today. We specialize in working with dual-income families in their 40s and 50s in the Philadelphia area.

OR

Vested Financial specializes in working with dual-income families in their 40s and 50s in the Philadelphia area. We manage all aspects of our clients' financial lives from planning for education and retirement to making sure money questions don't stale your dream vacation, to investing so you can live fully today.

MESSAGING POINT #1: WHAT

- › A full-service wealth manager (financial planning, life planning and investment management)
- › Expertise for mid-to-late career, dual income families
- › Proactively collaborate with all of your professional partners (i.e. accountant, attorney, etc.)

MESSAGING POINT #2: WHY

- › We protect and partner with you to honor your and your family's goals today and in the future so you can live fully today
- › Fully confident and aligned in your financial situation.

MESSAGING POINT #3: HOW

- › We proactively manage all aspects of your financial life through our "Fully Vested" Process, a 4-step process to protect and empower your goals through every phase of life (discover, act, monitor, adjust)
- › Subscription and annual engagement models based on need

EVIDENCE.

- › Founder was a corporate executive for 15 years prior to founding Vested Financial
- › Serve over 50 mid-to-late career dual income families
- › Certified Life Planner and CFP

EVIDENCE.

- › 98% retention
- › Our clients report the greatest value gained from partnering with Vested Financial is "peace of mind" and "confidence"

EVIDENCE.

- › Fully Vested Process™ overview
- › Fully Vested Process™ case study
- › Fully Vested Quarterly Report sample

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