



Get to Know The Money Couple

with BETHANY & SCOTT PALMER

on the **99** BEST
MARKETING
IDEAS PODCAST
EPISODE 7

BEST TIP FROM THIS EPISODE

"We want to make sure that we're differentiating ourselves and that we're adding more value. We constantly need—as advisers—to be showing that."

–Bethany Palmer

TAKE ACTION

1. Set a goal. What can you do to differentiate your practice?
2. Plan. Take advantage of the Money Couple's discount from this episode.
3. Catalog names to reach out to. Which of your clients can your new approach benefit?

STAY ON TRACK

- Encourage your assistant or team to help
- Make notes on agenda to include your planning steps
- Report sourced names at meeting

BRING IN MORE CLIENTS BY UTILIZING THE 5 MONEY PERSONALITIES

When Bethany and Scott Palmer wanted to grow their practice, they decided to differentiate themselves. They developed the 5 Money Personalities so that they could understand who their clients are and learn how they might struggle with their finances as a couple.

But they didn't become an instant success over night.

Step 1: Test your ideas.

"It feels so good when you launch any kind of new idea, but you do it knowing with confidence that it's going to work. The only way you can get there is by taking the time, taking the effort and the money to be able to test it first."

–Bethany Palmer

Step 2: Get discounted access to the 5 Money Personalities for practice.

Listen to this episode for a discount code that Scott and Bethany give that'll help you save on their Financial Advisor Ally program.

Step 3: Meet with your clients.

"We're not asking any financial adviser or professional out there to change the way they currently do their investments, to change their risk questionnaire. Everything stays the same. This [program] just comes alongside you and puts you in a position to understand your client and talk to them in a way that no one else has."

–Scott Palmer

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