LAUNCH SERIES · STAGES 0 & 1

Getting *Started*

Choosing your path, getting licensed, and landing your first 30 to 50 clients. The decisions that determine everything.

THE 8-STAGE ADVISOR SCALING ROADMAP

0	1	2	3	4	5	6	7
AFFILIATE	MONETIZE	SYSTEMATIZE	DELEGATE	MULTIPLY	OPTIMIZE	SCALE	EXIT

By Jeremy Straub, CEO · Coastal Wealth

You Are Here

Launch Series: Stages 0 & 1

THE 8-STAGE ADVISOR SCALING ROADMAP

0	1	2	3	4	5	6	7
Affiliate	Monetize	Systematize	Delegate	Multiply	Optimize	Scale	Exit

STAGE 0

Stage 0: *Affiliate*

Choose your affiliation path. Get licensed. Find a mentor. Prepare financially and mentally for the career ahead.

STAGE 1

Stage 1: *Monetize*

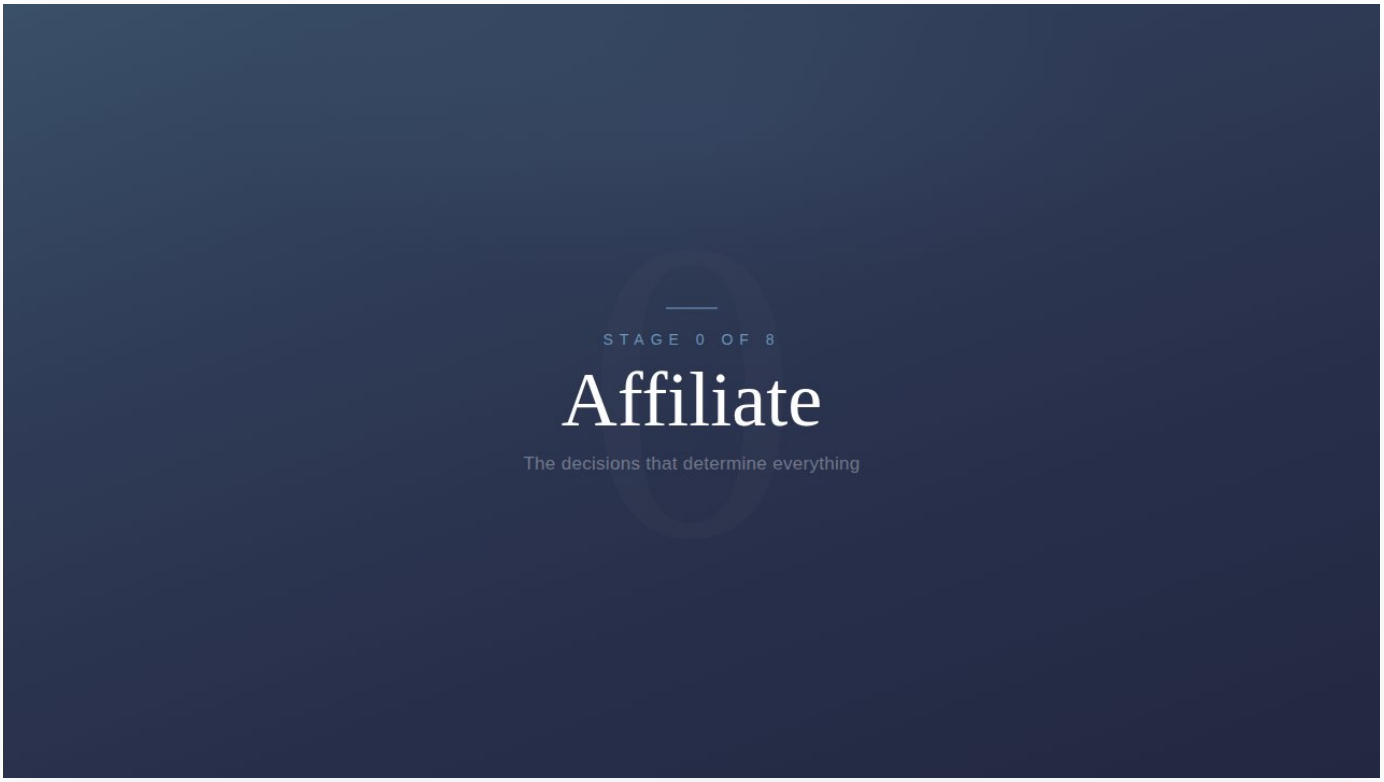
Get your first 30 to 50 clients. Hit $200K in revenue. Prove this is a business, not an expensive hobby.

0 to 1	$0 to $25M	$0 to $250K	~300,000
HEADCOUNT	AUM RANGE	REVENUE	ENTER ANNUALLY

WATCH THIS FIRST

Stage 0: *Affiliate*

The Decisions That Determine Everything



Jeremy walks you through the 6-question personality test, the 5 affiliation models (wirehouse, agency, independent BD, RIA, hybrid), the regulatory landscape, licensing requirements, financial preparation, and how to find a mentor.

6-Question Personality Test

5 Affiliation Models

Licensing & Regulatory Guide

Financial Preparation

Stage 0: *Affiliate*

HEADCOUNT: 0
REVENUE: $0
AUM: $0

YOUR ROLE	Aspiring Advisor
LEADERSHIP	None. You are not in business yet. You are deciding if this is the right path.
# OF ADVISORS	~30,000 enter licensing annually. About 60% finish. About 40% of those survive year one.

FUNCTION	CONSTRAINT	TO GRADUATE
SERVICE MODEL / COMPLIANCE	Don't understand regulatory structure. Confused by FINRA vs. SEC vs. state insurance.	Get clear on regulatory path. Pass required exams (Series 7/65/66 + SIE). Get insurance licenses if needed.
MARKETING	No idea how to get clients. Scared of selling to friends and family. Confused about what you can say before licensed.	Build your "warm market" list (200+ names). Start networking. Don't promise anything until licensed.
SALES	Zero sales experience. Terrified of rejection. Worried you will be "that insurance guy."	Develop basic sales mindset. Shadow experienced advisors (10+ meetings). Learn discovery process.
SERVICE	Don't know what advisors actually DO day-to-day. Romantic vision of "helping people."	Shadow an advisor for 1 to 4 weeks. See the reality. Make sure you actually want this job.
TECHNOLOGY / PLATFORMS	Overwhelmed by systems: CRM, planning software, portfolio accounting, custodians.	Get familiar with basic advisor tech through shadowing or training. Don't need to master yet.
TALENT ACQUISITION	Just you. Need to choose: wirehouse, indie BD, RIA, captive agent, or employee advisor.	Choose your affiliation path based on comp structure, support needs, independence level, and career goals.
HR / PEOPLE	Solo aspiring advisor. Probably have imposter syndrome. No support system.	Find a mentor. Join a study group. Build your support system before you start.
FINANCE	Personal money is the business money. No savings runway. No understanding of startup costs.	Save 6 to 12 months of living expenses. Understand startup costs for your model. Open business account.
Bottom Line	Nothing is happening yet	Licensed, affiliated, financially prepared, mentor in place, committed

STAGE 0: AFFILIATE

The Decisions That Determine *Everything*

THE PERSONALITY TEST

Before choosing a model, answer six questions honestly. Do you need structure and training? Can you handle income uncertainty? Do you have a built-in network? Do you want to build equity? Are you entrepreneurial? How much capital do you have? Your answers point you to the right affiliation model. Write them down before moving forward.

FIVE AFFILIATION MODELS

Wirehouse (Merrill, Morgan Stanley): training + salary, but 30 to 40% payout and you don't own clients. Agency (Northwestern, Guardian): insurance-first, great training, 60 to 70% quit in 2 years. Independent BD (LPL, Raymond James): 80 to 95% payout, full independence, but no training and $10 to 30K startup. RIA (fee-only fiduciary): full ownership, but $50K+ to start. Hybrid/boutique: junior to a senior advisor, lower risk entry point.

REGULATORY LANDSCAPE

Three regulators govern you: FINRA (broker-dealers, commission-based, Series 7/6/63/66), SEC and state regulators (RIAs, fee-based, fiduciary, Series 65/66), and state insurance departments (life, disability, LTC, fixed annuities). Most advisors in practice are dual registered. Your job is to understand which path matches your business model.

LICENSING STRATEGY

Pass the SIE first (prerequisite for everything). Then your firm-specific exams. Don't schedule until you are genuinely ready because retakes cost about $200 plus the time and momentum you lose. Study 2 to 4 hours daily for 4 to 8 weeks. Use a prep course. Find a study partner. Treat this like a full-time job.

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FINANCIAL PREPARATION

Save 6 to 12 months of living expenses before you start. Cut personal expenses to the bone. Understand startup costs for your model: RIA is $50K+, independent BD is $10 to 30K, wirehouse/agency covers your costs. If you cannot fund it, don't start yet. This career is too risky if you are already financially stressed.

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FINDING A MENTOR

Advisors without mentors fail at 3x the rate of those with one. Find someone 5 to 10 years ahead of you, not 30 years ahead. Someone whose practice looks like what you want to build. Offer value first. Ask specific questions, not "how do I succeed?" Join study groups, industry associations, and local advisor communities.

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MENTAL PREPARATION

This career is hard. Most people in year one think about quitting every other day. In year two, once a week. In year three, once a month. Don't romanticize it. The reality includes a lot of paperwork, compliance, administrative work, and rejection. But the advisors who survive build incredible lives: meaningful client relationships, real wealth, and a sellable business they own.

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SHADOW BEFORE YOU START

Before committing, shadow an advisor for 1 to 2 weeks. See what the job actually looks like. The good and the bad. Make sure you actually want this life. Most people who quit could have saved themselves the trouble if they had seen the reality first.

> *"Stage 0 is not where the money is. It is where the decisions are. The choices you make right now determine your entire trajectory."*
>
> - JEREMY STRAUB, CEO, COASTAL WEALTH

COMMON TRAPS

1

Choosing Based on Money Alone

Someone reads that independent RIA advisors keep 100% of revenue and thinks it is obviously the best model. But they don't have the capital, network, or temperament for it. Choose based on fit, not theoretical upside.

2

Skipping Financial Preparation

Jumping in with three months of savings, then panicking when month four arrives and you still have no clients. This career requires runway. Six to twelve months minimum.

3

Romanticizing the Career

Going in thinking it is all deep conversations about people's dreams. The reality: a lot of paperwork, compliance, admin work, and rejection. Rewarding, but hard.

4

Going It Alone

No mentor. No study group. No support system. Advisors without mentors fail at 3x the rate of those who have one. Find your people.

5

Delaying Action

Researching forever. Thinking about it. Reading another article. But never registering for the exam, never picking a firm. Imperfect action beats perfect planning every single time.

GRADUATING FROM STAGE 0

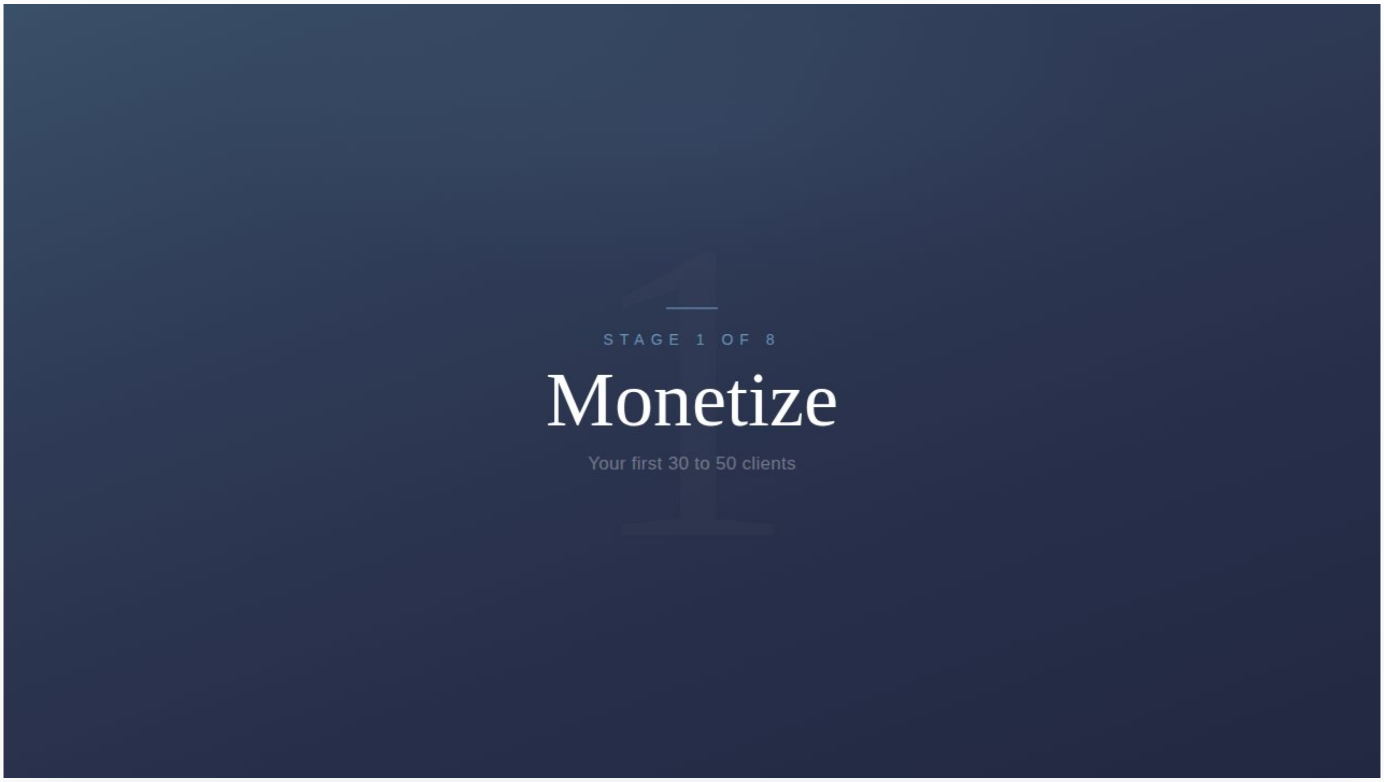
You are ready for Stage 1: MONETIZE when:

- ✓ Chosen your affiliation path
- ✓ Passed your exams and gotten licensed
- ✓ Registered with a firm or broker-dealer
- ✓ 6 to 12 months of living expenses saved
- ✓ Mentor or support system in place
- ✓ Understand the sales process (even if it scares you)
- ✓ Mentally prepared for the grind
- ✓ Committed to this path

YOUR NEXT STAGE

Stage 1: *Monetize*

Your First 30 to 50 Clients. Your First $200K.



Jeremy walks you through the exact playbook for surviving Stage 1: warm market strategy, the COI introduction framework, discovery meeting structure, handling fee objections, and the mindset shift from planner to salesperson.

- **Warm Market Playbook**
- **COI Introduction Framework**
- **Discovery Meeting Script**
- **Mindset & Resilience**

Stage 1: *Monetize*

HEADCOUNT: 1 (JUST YOU)
REVENUE: $0 TO $250K
AUM: $0 TO $25M

YOUR ROLE	Hunter
LEADERSHIP	Still just you. Your only job is to find clients and survive.
# OF ADVISORS	~300,000 newly licensed advisors enter annually. 60% quit within 12 months.

FUNCTION	CONSTRAINT	TO GRADUATE
SERVICE MODEL / COMPLIANCE	No paying clients. Scared to prospect. Don't know what you can and can't say about performance.	Get 30 to 50 household clients. Learn compliance basics. Build a V1 service offering.
MARKETING	Nobody knows you exist. Can't use testimonials. Social media feels like shouting into the void.	Build your warm market list (200+ names). Master the COI introduction. Get first 10 referrals.
SALES	Don't know how to ask for business without feeling sleazy. Prospects say "I'll think about it."	Develop a discovery process. Handle objections. Close 1 in 3 qualified prospects.
SERVICE	Doing EVERYTHING yourself. Paperwork, trading, rebalancing, planning, client calls, billing.	Create a basic service calendar. Batch similar tasks. Stop treating every client like $10M.
TECHNOLOGY / PLATFORMS	Staring at 6 systems. Can't run a simple report. Entering client data three times.	Get functional with core tech: CRM, planning software, portfolio accounting. Basic workflows.
TALENT ACQUISITION	Just you. Can't afford help. Afraid to ask anyone to work for you.	Not hiring yet. But start documenting what takes your time so you know what to delegate later.
HR / PEOPLE	You are alone. Some days it feels like freedom. Other days it feels like drowning.	Find an accountability partner. Join a study group. Don't isolate. 3x survival rate with support.
FINANCE	Inconsistent income. No salary. Living on savings. Panicking about rent.	Generate $15 to 20K/month consistently for 3 months. Open business checking. Track every dollar.
Bottom Line	Your business makes no money	First 30 to 50 clients, $200K+ annual revenue, proof of concept

STAGE 1: MONETIZE

Stop Preparing. Start *Doing.*

📣

MARKETING: GETTING PEOPLE TO KNOW YOU EXIST

Your fastest path to clients is your warm market. Write down 200 names: family, friends, former colleagues, neighbors, people from church, gym, kids' sports teams. Then send a simple text: "Hey, I recently started as a financial advisor. I am not trying to sell you anything. But if you know anyone who might benefit from a conversation about their finances, I would love an introduction." Use the word "introduction," not "referral."

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COI RELATIONSHIPS: THE 6 TO 12 MONTH PLAYBOOK

Build relationships with CPAs, estate attorneys, mortgage brokers, and real estate agents. The rule: refer them a client before you ask for one back. You need to give 5 to 6 introductions before you get one back. This is not a quick win. It is the foundation of your business for the next decade. Sit on a charity board. Get involved in business organizations. Show up consistently.

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SALES: THE DISCOVERY MEETING

Let the prospect talk. Your job is to listen, not pitch. Ask: "What prompted you to come in today? What would you like to accomplish? What concerns you most about your financial future?" Then describe outcomes, not products. "Based on what you shared, here is what working together could look like." Close with a clear next step. Don't say "let me know." Say "let's schedule our next meeting to go through the plan."

⭐

SERVICE: TIER YOUR CLIENTS FROM DAY ONE

Not every client deserves the same level of service. A $50K client getting quarterly reviews is stealing time from your $500K prospect. Define A, B, and C tiers now. A clients get the full experience. B clients get the standard. C clients get the minimum. This is not unfair. It is actually unfair to your best clients if everyone gets the same attention.

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TECHNOLOGY: GET FUNCTIONAL, NOT PERFECT

You need four tools working: CRM (track every contact, every interaction), financial planning software (run plans, show projections), portfolio accounting (manage investments), and e-signature (stop mailing documents). Don't spend weeks evaluating options. Pick the tools your firm provides or recommends and learn them. Functional beats perfect at Stage 1.

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MINDSET: VOLUME SOLVES ALMOST EVERYTHING

A terrible pitch delivered 100 times will outperform a perfect pitch delivered 5 times. Always. The advisors who survive Stage 1 are not the smartest or most credentialed. They are the most relentless. Your emotional intelligence matters more than your technical knowledge. The ability to get rejected and make the next call anyway is what separates survivors from casualties.

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DAILY DISCIPLINE: LEAD GENERATION FIRST

Your first productive hour every single day goes to lead generation. Not email. Not CRM cleanup. Not studying for your next designation. Prospecting calls, COI meetings, follow-ups. This is non-negotiable. Track your numbers weekly: how many new prospect conversations, how many meetings booked, how many proposals sent, how many clients closed.

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THE NUMBERS THAT MATTER

Target: 10 new prospect conversations per week. 3 to 5 first meetings per week. 1 to 2 new clients per week. If you hit those numbers consistently for 6 months, you will graduate Stage 1. If you are not hitting them, the problem is always activity. Not your pitch. Not your website. Not your business cards. Activity.

> *"A terrible pitch delivered 100 times will outperform a perfect pitch delivered 5 times. Always. The ones who talk to the most people are the ones who win."*
>
> - JEREMY STRAUB, CEO, COASTAL WEALTH

COMMON TRAPS

1

The Branding Trap

Spending weeks perfecting your logo, website, and company name. Nobody is finding you through your website right now. Three months perfecting one is three months not prospecting.

2

The Education Trap

Studying for your next designation instead of making calls. You will learn more from 10 discovery meetings than hundreds of hours of coursework.

3

The Busy Trap

Feeling busy with the wrong things. Reorganizing your CRM, building email templates for an empty list. If it is not directly connected to getting a prospect in front of you, it is a distraction.

4

The Fairness Trap

Treating all clients the same because "it feels right." Giving the $50K client the same attention as the $500K client is actually unfair to your best clients.

5

The Isolation Trap

Doing this alone. Not telling anyone how hard it is. Advisors with mentors and support systems survive at 3x the rate. Find your people.

6

Waiting for Permission

Waiting until you feel ready, until your pitch is perfect, until you are confident. Confidence comes from doing. Not from waiting.

GRADUATING FROM STAGE 1

You are ready for Stage 2: SYSTEMATIZE when:

- ✓ 30 to 50 household clients
- ✓ $200K+ annual revenue ($15 to 20K/month consistently)
- ✓ Basic service calendar in place
- ✓ Tracking your metrics (lead sources, close rates)
- ✓ Understand your ideal client and can describe them clearly
- ✓ Ready to hire your first team member

ADJACENT STAGES

Where You've Been. Where You're *Going.*

Stage 0 is preparation. Stage 1 is survival. Here is what comes next when you graduate.

Stage 2: *Systematize*

NEXT STAGE · $25 TO $75M AUM

SERVICE MODEL	Treating all clients the same	Define A/B/C tiers with different service levels
MARKETING	Referrals are random and inconsistent	Systematic referral process + one consistent channel
SALES	No sales script, every meeting is different	Documented discovery process, 30%+ close rate
TALENT	Can't afford help yet	Hire first admin or CSA (part-time)
BOTTOM LINE	Working harder, not smarter	Systems replace hustle, ready for first hire

Stage 3: *Delegate*

AFTER THAT · $75 TO $150M AUM

SERVICE MODEL	Service model lives in your head	Document every touchpoint in SOPs
SALES	You personally close every deal	Junior advisor running B client meetings
TALENT	Haven't delegated real work	3 to 6 team members with clear roles
BOTTOM LINE	Solo operator with helpers	Manager who can take a week off

REMEMBER

Links to the Stage 0 and Stage 1 videos are inside this PDF. Watch them in order. Stage 0 first (the decisions), then Stage 1 (the execution). The adjacent stages show you what comes next so you can start preparing.

YOUR ACTION PLAN

Make It *Concrete*

STAGE 0 PRIORITIES

1. **This week:** Answer the 6 personality test questions. Write them down. They determine your path.
2. **This month:** Research the 5 affiliation models. Talk to advisors in each. Shadow someone for a week.
3. **Within 60 days:** Choose your model. Register for your exams. Start studying 2 to 4 hours daily.
4. **Within 90 days:** Pass exams. Sign with a firm. Find a mentor. Financial runway confirmed.
5. **Ongoing:** Build your warm market list to 200+ names before you officially start.

STAGE 1 PRIORITIES

1. **Daily:** First productive hour goes to lead generation. Prospecting calls, COI meetings, follow-ups. Non-negotiable.
2. **Weekly:** 10 new prospect conversations. 3 to 5 first meetings. Track your numbers every Friday.
3. **Monthly:** Touch each COI. Send your warm market message to 10 new people. Review close rates.
4. **Within 90 days:** Identify 3 COI partners (CPA, attorney, mortgage broker). Refer them a client first.
5. **Within 6 months:** 30+ household clients. $15K+ monthly revenue sustained. Functional CRM. Ready for Stage 2.

QUESTIONS TO REFLECT ON

The Conversations You Need to Have with *Yourself*

Be honest. Your answers determine what to prioritize next.

STAGE 0 REFLECTIONS

- *Do I need structure and training, or am I a self-starter?*
- *Can I handle 6 to 12 months of unpredictable income?*
- *Do I have a natural network of 200+ people, or do I need to build one from scratch?*
- *Am I doing this to build a business I own, or do I want a high-paying job?*
- *How much capital do I realistically have? Can I fund my chosen model?*
- *Have I actually shadowed an advisor and seen the day-to-day reality?*
- *Who is my mentor? If I don't have one, what am I doing about it?*

STAGE 1 REFLECTIONS

- *How many prospect meetings did I have this week? Is that enough?*
- *Am I spending my first hour on lead generation, or on comfortable busy work?*
- *Are there 3 people I could reach out to today that I have been avoiding?*
- *Have I identified my 3 COIs? Have I referred anyone to them yet?*
- *Am I treating all clients the same, or have I started tiering?*
- *What am I afraid of? What would I do if I were not afraid?*
- *Do I have an accountability partner? If not, why not?*
- *What is my number? How many clients to hit $20K/month? Am I on pace?*

RECOMMENDED READING

Books That Will Accelerate Your *Growth*

Curated for the exact challenges you face at Stages 0 and 1.

The Little Black Book of Networking JEREMY'S PICK

by Jeffrey Gitomer

Jeremy references this directly in Stage 1: you must give 5 to 6 introductions before you get one back. The book that teaches you how COI relationships actually work in practice.

How to Win Friends and Influence People

by Dale Carnegie

The foundational sales and relationship book. At Stage 1 you are a salesperson who happens to know financial planning. This teaches you how to connect with people authentically.

The Millionaire Next Door

by Thomas J. Stanley

Understand who your future clients actually are. Most wealthy people don't look wealthy. This reframes how you identify and approach high-net-worth prospects.

Building a StoryBrand

by Donald Miller

Learn to position yourself as the guide, not the hero. Your client is the hero of their own financial story. This framework transforms how you talk about what you do.

Atomic Habits

by James Clear

Stage 1 is won or lost on daily habits. The advisors who prospect first thing every morning survive. The ones who don't, quit. This book teaches you how to build the habits that matter.

Grit: The Power of Passion and Perseverance

by Angela Duckworth

60% of new advisors quit in year one. The survivors are not smarter or more talented. They have grit. This is the research behind why persistence matters more than talent.

AI PROMPT LIBRARY

Prompts to Put This Into *Practice*

Copy these into ChatGPT, Claude, or your preferred AI tool. Replace the bracketed sections with your specifics.

STAGE 0: CAREER PATH

AFFILIATION MODEL COMPARISON

"I am considering becoming a financial advisor. Help me compare these 5 affiliation models for my specific situation: wirehouse, agency, independent broker-dealer, RIA, and hybrid/boutique. My situation: I have [$X] in savings, [describe your network], I [do/don't] need training, and I [want/don't want] to build equity. For each model, give me: realistic year-1 income, startup costs, payout percentage, training provided, and who it is best for. Be brutally honest."

EXAM STUDY PLAN BUILDER

"I need to pass the [SIE / Series 7 / Series 65 / Series 66] exam. I can study [X] hours per day. Create a [4/6/8]-week study plan with daily topics, practice test schedule, and the specific areas where most people fail. Include what score I should be hitting on practice exams before I schedule the real one. I have [X] months before I need to be licensed."

FINANCIAL RUNWAY CALCULATOR

"I want to become a financial advisor using the [wirehouse/agency/independent BD/RIA] model. My current monthly expenses are [$X]. Help me calculate: (1) startup costs for my model, (2) how many months of runway I need, (3) a realistic month-by-month income projection for year 1, and (4) what I need to cut from my budget to extend my runway. Be conservative with income projections."

MENTOR OUTREACH SCRIPT

"I am a new financial advisor [or aspiring advisor] looking for a mentor. I want to find someone 5 to 10 years ahead of me who has built [describe the type of practice you want]. Write me 3 different outreach messages: one for LinkedIn, one for email, and one for an in-person introduction. The tone should be respectful, specific, and offer value. I don't want to sound like I am just asking for free help."

STAGE 1: CLIENT ACQUISITION

WARM MARKET TEXT MESSAGE BUILDER

"I am a new financial advisor building my practice. I have a list of [X] people in my warm market (friends, family, former colleagues, community contacts). Help me write 5 different text message templates I can customize for different relationship types: (1) close friend, (2) former colleague, (3) acquaintance, (4) family member, (5) professional contact. The messages should NOT pitch my services. They should ask for introductions to people who might benefit from a financial conversation. Keep them under 3 sentences."

COI INTRODUCTION FRAMEWORK

"I am a new financial advisor trying to build COI (Center of Influence) relationships with CPAs, estate attorneys, and mortgage brokers in [my city/region]. Create: (1) an email introduction template for reaching out to a CPA I have never met, (2) a list of 5 ways I can provide value to them BEFORE asking for referrals, (3) a 6-month relationship-building timeline with specific touchpoints, and (4) the exact script for how to ask for an introduction after I have referred them 2 to 3 clients."

DISCOVERY MEETING SCRIPT

"Help me build a discovery meeting framework for a new financial advisor. The meeting should: (1) open with rapport-building (2 minutes), (2) ask open-ended questions that let the prospect talk (15 minutes), (3) identify their top 3 financial concerns, (4) briefly describe what working together looks like (outcomes, not products), and (5) close with a clear next step. Include the exact questions to ask, how to handle 'I need to think about it,' and how to discuss fees without being defensive. Keep it under 45 minutes total."

WEEKLY ACTIVITY TRACKER

"Create a simple weekly activity tracking spreadsheet template for a new financial advisor at Stage 1. Columns should track: new prospect conversations, first meetings booked, first meetings held, proposals sent, clients closed, revenue generated, COI touchpoints, and referrals received. Include weekly targets for each metric based on a goal of 30 to 50 clients in 6 months. Add a formula row that shows if I am on pace."

MINDSET & RESILIENCE

OBJECTION HANDLING PLAYBOOK

"I am a new financial advisor. Create a playbook for handling the 10 most common objections I will hear from prospects: 'I already have an advisor,' 'I need to think about it,' 'I don't have enough money,' 'I can do this myself,' 'What are your fees?,' 'I don't trust financial advisors,' 'I'm too young for this,' 'Send me some information,' 'I need to talk to my spouse,' and 'The market is too volatile.' For each, give me: the underlying concern, a response framework, and an example script. Tone should be confident but not aggressive."

ACCOUNTABILITY PARTNER FRAMEWORK

"I am a new financial advisor looking to set up an accountability partnership with another advisor at my stage. Create: (1) a weekly check-in agenda (15 minutes), (2) the 5 metrics we should share with each other every week, (3) how to handle it when one of us is falling behind, and (4) a 90-day goal-setting framework we can use together. The goal is to keep each other honest about prospecting activity and prevent the isolation that causes most new advisors to quit."

ELEVATOR PITCH BUILDER

"I am a new financial advisor at [firm name] working with [target client description]. Help me create 3 versions of my elevator pitch: (1) a 10-second version for casual introductions, (2) a 30-second version for networking events, and (3) a 60-second version for when someone asks 'What do you do?' The pitches should focus on the problems I solve for clients, not the products I sell. They should sound natural, not rehearsed. Include a question at the end that opens a conversation."

90-DAY SURVIVAL PLAN

"I just started as a financial advisor. I have [$X] in savings and [X] months of runway. Help me build a 90-day survival plan that covers: (1) week-by-week activity targets, (2) income projections based on [my model], (3) the minimum number of clients I need by day 90 to be on pace, (4) a daily schedule template that prioritizes prospecting, and (5) specific milestones at day 30, 60, and 90 that tell me if I am on track or need to adjust. Be realistic, not optimistic."

WHAT'S NEXT

Ready to *Accelerate?*

You now have the roadmap. The constraint tables. The action plan. The prompt library. The question is: do you want to implement it alone, or with a team that has already figured it out?

If you are a growth-minded advisor ready to launch your career, and you want the training, the brand, and the support system behind you, let's talk.

BOOK A STRATEGY SESSION

MyCoastalWealth.com