



# The Dynamic Duo: A Brand and a Process

## Natixis Global Asset Management

# Today's session is about helping you

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- Develop a **strong personal brand** as a financial professional and team
- Capture your share of the competitive **high-net-worth market**
- Show the importance of **building high-value client relationships** to generate reoccurring business
- Brand applies to **every aspect of our lives**
- Identify **a few keys to success** in executing on a plan

# The dynamics of a corporate brand

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- Embody company values
- Define an overall customer experience
- Companies spend millions of dollars on extensive brand-building activities
- Great brands are unique, relevant, consistent, and passionate

# What's the meaning of these brands?

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**Kleenex**<sup>®</sup>  
BRAND TISSUES

# What's the meaning of these brands?

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# What's the meaning of these brands?

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# Everyone has a personal brand

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- It's driven by **what you believe in** but more importantly it is what people think of you
- It's the **impression** your clients have of you
- It's demonstrated by your **actions**
- **Actions** speak louder than words



“ We are what we repeatedly do. Excellence, then, is not an act, but a habit.” – Aristotle

# Strong personal brands lead to success

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## Warren Buffett

A master at uncovering hidden value

# Strong personal brands lead to success

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**Steve Jobs**  
Creative innovator

# Strong personal brands lead to success

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COURTESY: HARPO INC.

**Oprah Winfrey**  
Her stamp of approval  
is worth millions

# Strong personal brands lead to success

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**You!**

What is your brand?

# Effective 'Brand' Communication

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## Develop your brand:

- Who are you and what do you stand for?
- What are you passionate about? What interests you?
- What do you want people to take away when they meet you?
- What is different about you?
- How do you add value to your world?



# Actionable 'ACTION' Ideas

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- 'How to get better' breakfasts?
- Scrap book idea
- Tiffany's Box: Brand Training for your team
- Their **PASSION!**
- The client intelligence file for your top dozen
- Office activity
- Repetition
- Scarcity
- Transformation vs. transactional

# Ted's Tips for Effective Execution/Goal Setting

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- Commitment (work ethic) to growth – muscle work
- Adopt a process
- Goal Setting/have a plan (how many, what kind)
- Pick 12 clients – all their trust (money)
- Master the client: Client Intelligence File
- Be specific with the ask! Rehearse the ask!

# It starts with trust

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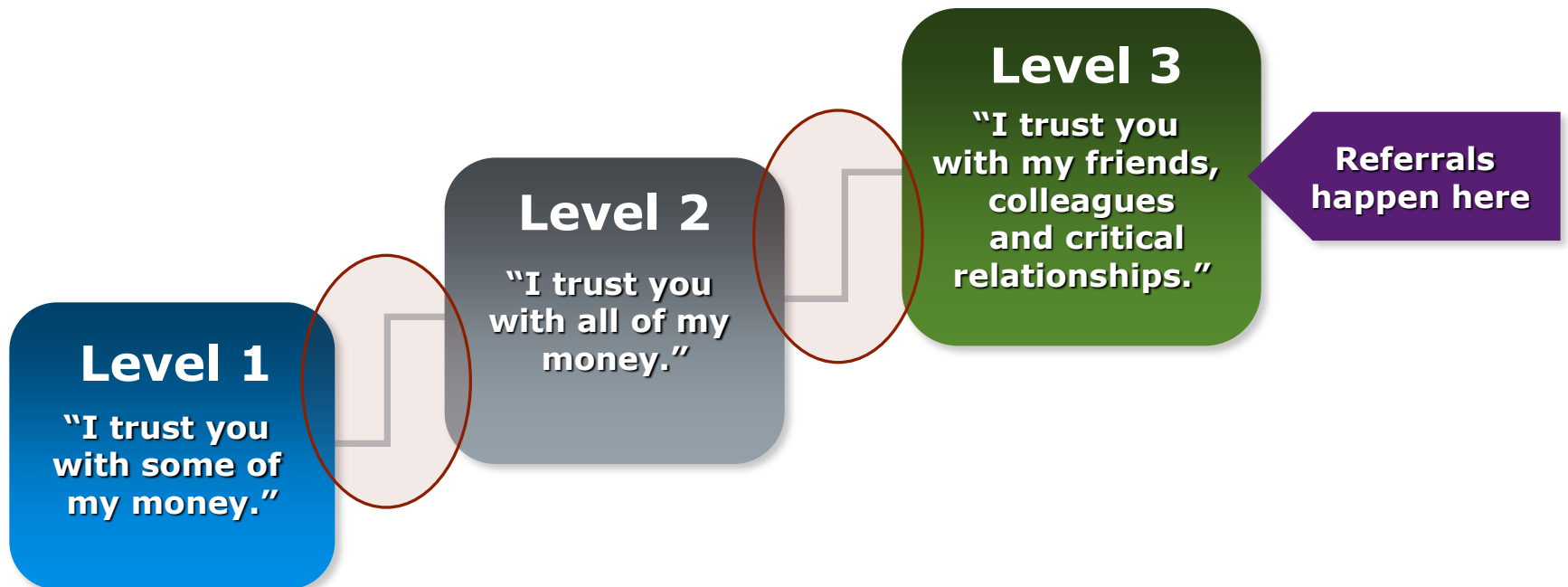


## When a potential referral provider says:

- I can't think of anyone
- Let me think about it
- I'll get back to you
- Give me your cards
- I don't get involved with my friends' finances
- I don't give referrals
- **What they are really saying is...  
I don't TRUST you yet!**

# How client trust fuels the referral generator

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# Today's session was about helping you

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- Develop a **strong personal brand** as a financial professional and team
- Build **high-value client relationships** to generate using trust as a foundation
- Identify a few **keys to success** in execution on a plan

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**To learn more, call 800-862-4863 or visit [ngam.natixis.com](http://ngam.natixis.com)**

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