



## **2016 MDRT Annual Meeting e-Handout Material**

**Title:** Build a Brand That Sets You Apart

**Speaker:** Doug Towill, MBA

**Presentation Date:** Tuesday, June 14, 2016

**Presentation Time:** 3:30 - 5:00 p.m.

The Million Dollar Round Table® (MDRT) does not guarantee the accuracy of tax and legal matters and is not liable for errors and omissions. You are urged to check with tax and legal professionals in your state, province or country. MDRT also suggests you consult local insurance and security regulations and your company's compliance department pertaining to the use of any new sales materials with your clients. The information contained in this handout is unedited; errors, omissions and misspellings may exist. Content may be altered during the delivery of this presentation.

© 2016 Million Dollar Round Table

---

Million Dollar Round Table  
325 West Touhy Ave.  
Park Ridge, IL 60068 USA

Slide 1



---

---

---

---

---

---

---

Slide 2



---

---

---

---

---

---

---

Slide 3



---

---

---

---

---

---

---

Slide 4



---

---

---

---

---

---

---

Slide 5



---

---

---

---

---

---

---

Slide 6



---

---

---

---

---

---

---

Slide 7

LET'S DO THIS *together*

 Show of Hands

 Think, pair, share

 Individual Reflection

 Take note

---

---

---

---

---

---

---

Slide 8



Personal Branding for Financial Advisors

---

---

---

---

---

---

---

Slide 9

TODAY'S AGENDA

WHAT A *brand* IS AND ISN'T

WHY *branding* IS IMPORTANT

INTRODUCE THE *brand* FRAMEWORK

---

---

---

---

---

---

---

Slide 10



---

---

---

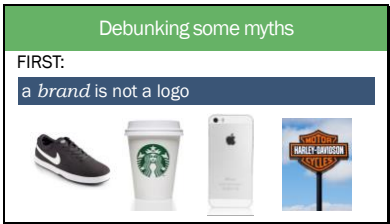
---

---

---

---

Slide 11



---

---

---

---

---

---

---

Slide 12



---

---

---

---

---

---

---

Slide 13



---

---

---

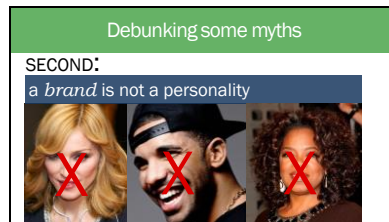
---

---

---

---

Slide 14



---

---

---

---

---

---

---

Slide 15



---

---

---

---



---

---

---


Slide 16

Debunking some myths



Are you licensed to sell  
*financial products*  
in your area?

Are you licensed to sell  
*insurance products*  
in your area?



---

---

---

---


---

---

---

Slide 17

So what exactly is a *brand*?



---

---

---

---

---

---

---

Slide 18



A *brand* is a person's  
gut feeling about a product,  
service, organization or  
an *individual*

---

---

---

---

---


---

---

Slide 19

So what exactly is a *brand*?

A *brand* is a person's gut feeling about a product, service, organization or an *individual*



---

---

---

---

---

---

---

Slide 20

So what exactly is a *brand*?

A *brand* is defined by *individuals*

It is a gut feeling because people are:

 emotional

 intuitive

 non-rational

---

---

---

---

---

---

---

Slide 21

IT'S NOT WHAT *you* SAY IT IS

---

---

---

---

---

---

---

Slide 22

IT'S WHAT *they* SAY IT IS

---

---

---

---

---

---

---

Slide 23

Personal *branding* defined

using a deep understanding of your unique gifts and distinct purpose to influence how you are perceived by others

---

---

---

---

---

---

---

Slide 24

WHY IS HAVING A 

*brand*

SO IMPORTANT?

---

---

---

---

---

---

---

Slide 25

Personal *branding* defined: The Framework

B

Biography and business

You as a person, your stories, your business

R

Reasons for what you do/how you act

Business beliefs and behaviours

A

Actions you take/processes

Client experience

N

Niche served

The people you serve, your ideal client, your "tribe"

D

Differences

Your focus, your remarkable features

---

---

---

---

---

---

---

Slide 26

B

Biography and Business

You as a person. Your stories. Your business.

---

---

---

---

---

---

---

Slide 27

B

Biography and Business

Biography

The authentic you

Unique history

Unique experiences

Unique gifts

---

---

---

---

---

---

---

Slide 28

B

Biography and Business

Whole Person – Doug Towill

PERSONAL

- Small town boy (born in Modesto)
- Business junkie (Boomm, MBA)
- West Coast/ Left Coast
- Proud father of teenage twin girls
- Tons of travel – love it

PROFESSIONAL

- 10 years as professional consultant
- 20+ years in investment management
- Practice Management - not Product
- Trends and Tools
- "Cutting edge: communicated"

---

---

---

---

---

---

---

---

Slide 29

B

Biography and Business


What is your biography?

PERSONAL

- Where are you from?
- What are you passionate about?
- What achievements are you most proud of?

PROFESSIONAL

- How long have you been an advisor?
- What is your focus or specialty?
- What inspires you on a professional level?



---

---

---

---

---

---

---

---

Slide 30

B

Biography and Business

Share your story



---

---

---

---

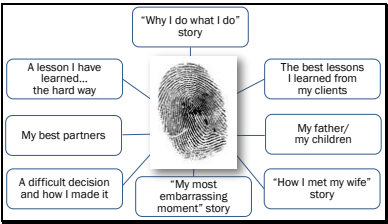
---

---

---

---

Slide 31



---

---

---

---

---

---

---

Slide 32



---

---

---

---

---

---

---

Slide 33



---

---

---

---

---

---

---

Slide 34



---

---

---

---

---

---

---

Slide 35



---

---

---

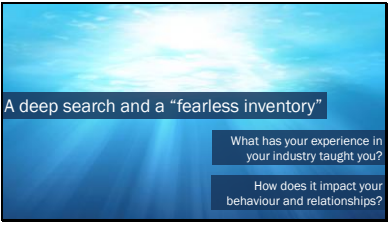
---

---

---

---

Slide 36



---

---

---

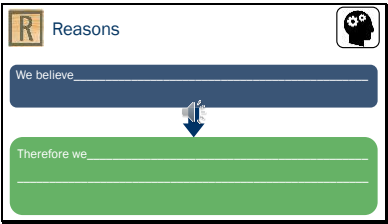
---

---

---

---

Slide 37



---

---

---

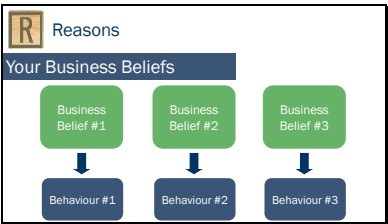
---

---

---

---

Slide 38



---

---

---

---

---

---

---

Slide 39



---

---

---

---

---

---

---

Slide 40



---

---

---

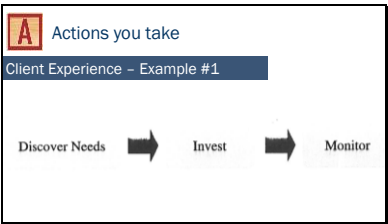
---

---

---

---

Slide 41



---

---

---

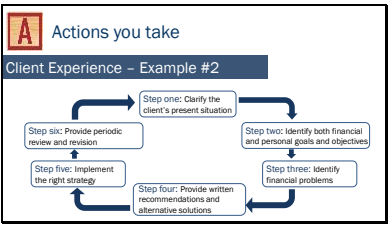
---

---

---

---

Slide 42



---

---

---

---

---


---

---

Slide 43

A

Actions you take



Do you have a *thorough, documented* process that you confidently convey to clients?

---

---

---

---

---

---

---

Slide 44



---

---

---

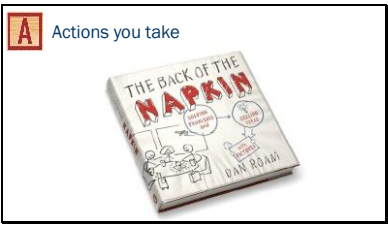
---

---

---

---

Slide 45



---

---

---

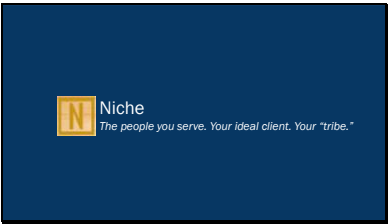
---

---

---

---

Slide 46



---

---

---

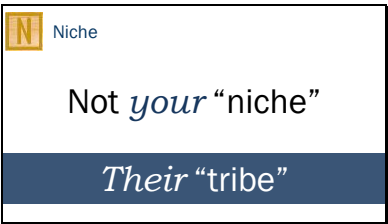
---

---

---

---

Slide 47



---

---

---

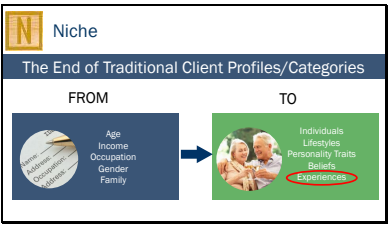
---

---

---

---

Slide 48



---

---

---

---

---

---

---

Slide 49



---

---

---

---

---

---

---

Slide 50



---

---

---

---

---

---

---

Slide 51



---

---

---

---

---

---

---

Slide 52



Becoming part  
of the *Tribe*

Identify a specific group – have they selected you?  
Gain a deep understanding of their issues and needs  
Package your entire offering to be uniquely attractive to them  
Locate the “watering holes”

Regular meetings  
Common publications  
Their websites

---

---

---

---

---

---

---

---

Slide 53



Microsoft Corporation 1978

---

---

---

---

---

---

---

---

Slide 54



Differences  
*Your focus. Your remarkable features.*

---

---

---

---

---

---

---

---

Slide 55

The three most important words in  
differentiating your personal brand:

---

---

---

---

---

---

---

Slide 56

Focus

---

---

---

---

---

---

---

Slide 57

Focus

---

---

---

---

---

---

---

Slide 58

# Focus

---

---

---

---

---

---

---

Slide 59



---

---

---

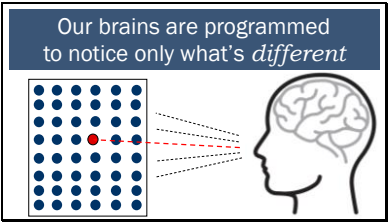
---

---

---

---

Slide 60



---

---

---

---

---

---

---

Slide 61

SOLUTION:  
BE *different*

---

---

---

---

---

---

---

Slide 62

NO.  
REALLY *different*

---

---

---

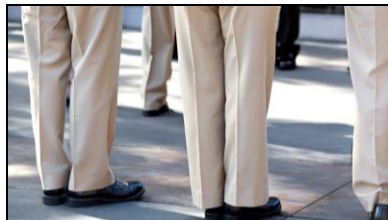
---

---

---

---

Slide 63



---

---

---

---

---

---

---

Slide 64



---

---

---

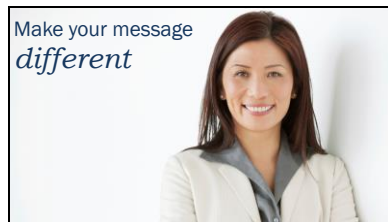
---

---

---

---

Slide 65



---

---

---

---

---

---

---

Slide 66



---

---

---

---

---

---

---

Slide 67



---

---

---

---

---

---

---

Slide 68



---

---

---

---

---

---

---

Slide 69



---

---

---

---

---

---

---

Slide 70

80/20 Rule

---

---

---

---

---

---

---

Slide 71

80

Differentiate yourself by:  
*The questions you ask*  
*The way you listen*  
*The relationships you build*

---

---

---

---

---

---

---

Slide 72

20

Help the clients and prospects  
by being very ready to articulate:  
*Your value*  
*Your brand*

---

---

---

---

---

---

---

Slide 73



---

---

---

---

---

---

---

Slide 74



---

---

---

---

---

---

---

Slide 75



---

---

---

---

---

---

---

## Slide 76

Thank You

For Advisor Use Only – Not for Distribution to Clients

Any commentaries and information contained in this communication are provided as a general source of information and should not be considered personal investment advice. Every effort has been made to ensure that the material contained herein is accurate at the time of publication. However, Doug Towill cannot guarantee its accuracy or completeness and accepts no responsibility for any loss arising from any use of or reliance on the information contained herein.

Facts and data provided by OgeToll and other sources are believed to be reliable when posted. We cannot guarantee that they are accurate or complete or that they will be current at all times. Information in this presentation is not intended to provide legal, accounting, investment or tax advice and should not be relied upon in that regard. OgeToll will not be responsible in any manner for direct, indirect, special or consequential damages of any kind, including, without limitation, lost profits, lost data, or any other damages, even if the possibility of such damages was known or should have been known. OgeToll does not warrant any commercial exploit in any way any content included in this presentation. You may download this presentation for your activities as a financial advisor; however you keep intact all copyright and other proprietary notices. Unauthorized downloading, re-transmission, storage in any medium, copying, redistribution, or republication for any purpose is strictly prohibited without the written permission of OgeToll.

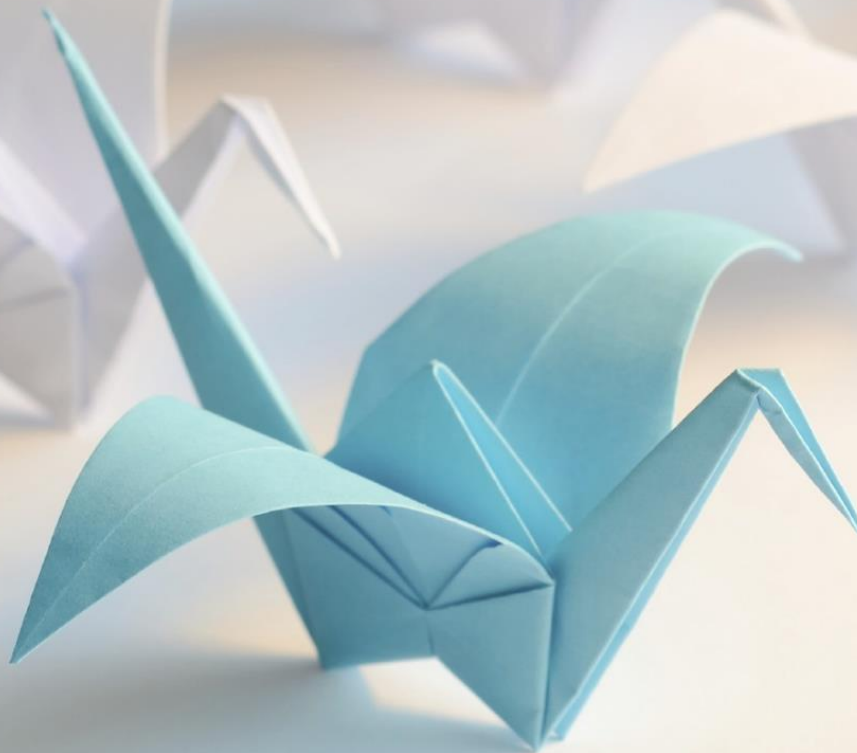
[illegible]

Presented by Doug Towill, MBA

BUILDING A *b*



TS YOU APART



## ABOUT *Doug*



Doug Towill, MBA, is Senior Vice-President of Strategic Business Development at CI Investments – the leading independent asset manager in Canada. He has dedicated his 30-year career to his passion: consulting to business professionals.

Since 1997, Doug has led groups that provide cutting-edge solutions to individual financial advisors, advisor teams and financial services organizations worldwide.

Doug has addressed countless audiences on issues clients face and how advisors, as trusted professionals, can best help them.

His dynamic and high-energy presentations provide both the impetus for change and the practical tools and techniques necessary to make substantive and sustained change a reality.

## ABOUT THIS *Focus Session*

Does your brand allow you to enjoy the success you deserve? In a market that bombards consumers with overwhelming amounts of information, financial advisors need to have a clear and powerful brand in order to stand out. In this session, Doug will introduce and explore a proven brand framework to help you:

- Develop your core messages to position yourself competitively
- Identify the foundational business beliefs that drive your actions and processes
- Effectively articulate your brand to clients and prospects.

You will be recognized as a leader in the industry and the “go-to” individual by consciously building and communicating your brand.

## ABOUT THIS *Workbook*

This content and exercises shown in this workbook are based on segments from the *Personal Branding for Financial Advisors* **full** workbook, which you will be able to access as a supplemental e-handout from the MDRT website at a later date.

# INTRODUCING THE *Brand* FRAMEWORK

The [Brand Framework](#) shown below is a comprehensive model that addresses the five major components of brand. To develop a powerful brand, you need to craft compelling and precise messages for each component of the framework.



## BIOGRAPHY AND BUSINESS

You as a person, your story, your business



## REASONS FOR WHAT YOU DO/HOW YOU ACT

Business beliefs and behaviours



## ACTIONS YOU TAKE/PROCESSES

Client Experience



## NICHE

The people you serve, your ideal client, your “tribe”




## DIFFERENCES

Your focus, your remarkable features

# THE *Comfort* CONTINUUM

Before attending Doug's Focus Session, please complete the table below. After the session, you will reassess your confidence and comfort levels.

The following topics could come up in a conversation with a client. How well prepared are you to respond to them? The comfort continuum measures how comfortable you are discussing these topics. Place a check mark under the statement below that most accurately expresses your feelings.

	Uncomfortable				Very Comfortable
TOPIC	I would be caught off guard and find it challenging to discuss.	I would be able to come up with something on the spot.	I have given this some thought and prepared comments, but don't feel confident with my response.	I am prepared for this topic and feel confident that I could discuss it at length, without hesitation.	
Your personal and professional biography, plus the nature of your business.					
How your experience impacts your business and relationships.					
The deep need you satisfy for your clients.					
How your business beliefs drive your behaviour.					
How your process, the actions you take, creates a consistent, reliable and remarkable client experience.					
The type of people you can best serve and the type of person you have had success with in the past.					
How you are remarkable or different from other advisors.					



## BIOGRAPHY AND BUSINESS

You as a person, your story, your business

### Connecting Concepts to Practice: Personal Background

Your personal background is an important part of your brand. This exercise will help you to capture the key facts and determine what impact those facts have on your brand.

Answer the following questions by completing the second column below.

QUESTION	YOUR PERSONAL FACTS
Where are you from?	
Where did you grow up?	
Where did you go to school and what did you study?	
What are you passionate about?	
What achievements are you most proud of?	
What is your family like?	
What are your hobbies?	
What first attracted you to this business?	



## BIOGRAPHY AND BUSINESS

You as a person, your story, your business

### Connecting Concepts to Practice: Professional Background

Your professional background is an important part of your brand. This exercise will help you to capture the key facts and determine what impact those facts have on your brand.

Answer the following questions by completing the second column below.

QUESTION	YOUR PROFESSIONAL FACTS
What is your business biography?	
How long have you been in business?	
What is your focus or specialty?	
What is your inspiration?	
What is exciting about what you do?	
What do you love to do?	



## REASONS FOR WHAT YOU DO/HOW YOU ACT

### Business beliefs and behaviours

#### Connecting Concepts to Practice: Business Beliefs

In the “I believe” space below, fill in 4 of your business beliefs. Make sure your beliefs are specific to this industry. An example of a business belief specific to our industry might be *“I believe clients are best served by a fee-for-service compensation model in which the interests of the client and the advisor are aligned.”*

Then, in the “therefore I...” space below, explain the impact each of these beliefs has on your actions.

1.	I believe...
	therefore I...
2.	I believe...
	therefore I...
3.	I believe...
	therefore I...
4.	I believe...
	therefore I...

[illegible]



NICHE

The people you serve, your ideal client, your “tribe”

NOTES:



# DIFFERENCES

Your focus, your remarkable features

What's one thing that makes you different?

# THE *Comfort* CONTINUUM: REVISITED

Now that you have completed this brand mini-workbook and attended Doug's focus session, it's time to re-assess your confidence and comfort levels.

The following topics could come up in a conversation with a client. How well prepared are you to respond to them? The comfort continuum measures how comfortable you are discussing these topics. Place a check mark under the statement below that most accurately expresses your feelings.

	Uncomfortable			Very Comfortable
TOPIC	I would be caught off guard and find it challenging to discuss.	I would be able to come up with something on the spot.	I have given this some thought and prepared comments, but don't feel confident with my response.	I am prepared for this topic and feel confident that I could discuss it at length, without hesitation.
Your personal and professional biography, plus the nature of your business.				
How your experience impacts your business and relationships.				
The deep need you satisfy for your clients.				
How your business beliefs drive your behaviour.				
How your process, the actions you take, creates a consistent, reliable and remarkable client experience.				
The type of people you can best serve and the type of person you have had success with in the past.				
How you are remarkable or different from other advisors.				

# THANK YOU

## For Advisor Use Only

Any commentaries and information contained in this communication are provided as a general source of information and should not be considered personal investment advice. Every effort has been made to ensure that the material contained herein is accurate at the time of publication. However, Doug Towill cannot guarantee its accuracy or completeness and accepts no responsibility for any loss arising from any use of or reliance on the information contained herein.

Facts and data provided by Doug Towill and other sources are believed to be reliable when posted. We cannot guarantee that they are accurate or complete or that they will be current at all times. Information in this presentation is not intended to provide legal, accounting, investment or tax advice, and should not be relied upon in that regard. Doug Towill will not be responsible in any manner for direct, indirect, special or consequential damages howsoever caused, arising out of the use of this presentation. You may not modify copy, reproduce, publish, upload, post, transmit, distribute, or commercially exploit in any way any content included in this presentation. You may download this presentation for your activities as a financial advisor provided you keep intact all copyright and other proprietary notices. Unauthorized downloading, re-transmission, storage in any medium, copying, redistribution, or republication for any purpose is strictly prohibited without the written permission of Doug Towill.

