



AN EVIDENCE-BASED COMMUNICATION SCHEDULE TO RETAIN AND GAIN CLIENTS

FPA-DFW 2025

Evan T Beach, CFP[®], EA, AWMA[®]

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ABOUT EVAN

- CERTIFIED FINANCIAL PLANNER™ professional & IRS Enrolled Agent
- President: Exit 59 Advisory
- InvestmentNews Rising Star, 2025 FPA-NCA Planner of the Year, Washingtonian Top Advisor, Northern Virginia Magazine Top Advisor.
- Former Director of Wealth Advisory/Partner, Campbell Wealth Management, Alexandria VA
- Charged with growth initiatives, grew CWM from \$300MM in AUM in 2015 to over \$1B in 2021
- Kiplinger columnist
- Special Topics Instructor (2016-2024): Texas Tech University PFP Program

WHAT ARE WE SOLVING FOR?

- How do I retain clients?
- How do I get new clients?
- How do I do all of this without having to work more?





Retain

Investment Communications
Scheduled Meetings

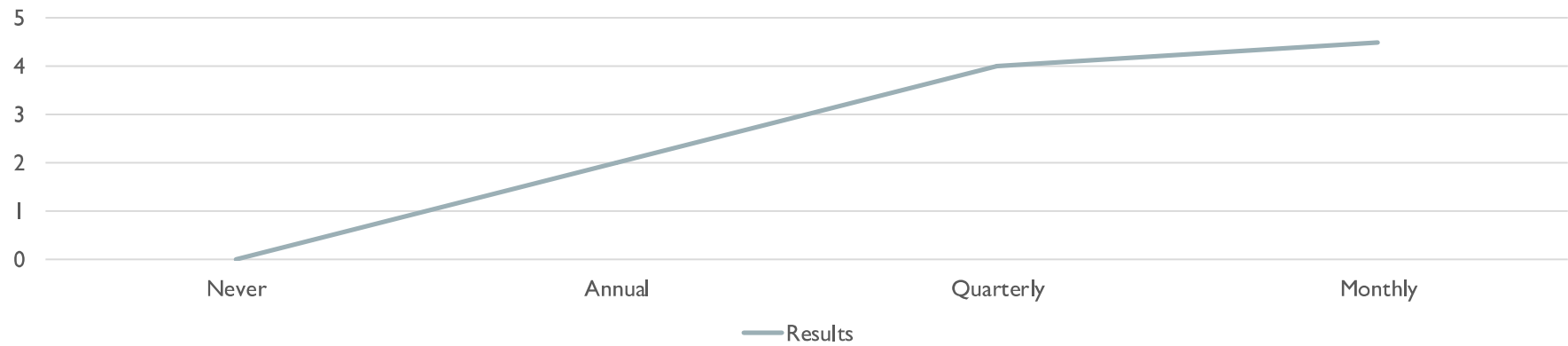


Gain

Greeting Cards and Personal Notes
Non-Investment Educational Communication
Hobby Communications

AGENDA

Retention



EDUCATIONAL INVESTMENT

EDUCATIONAL: INVESTMENT 11 TOUCHES/YR



Rebalance Emails

5 in a typical year



Quarterly Investment Updates

Sourced from client questions



2 Meetings Per Year

Video (Loom) in Advance

Satisfaction, Trust, Referrals



SCHEDULED MEETINGS



March Planning

What's coming this year?
Tax forms for April deadline



October Strategy

12/31 deadlines
Cap Gains, Roth Conversions, RMD's, etc.

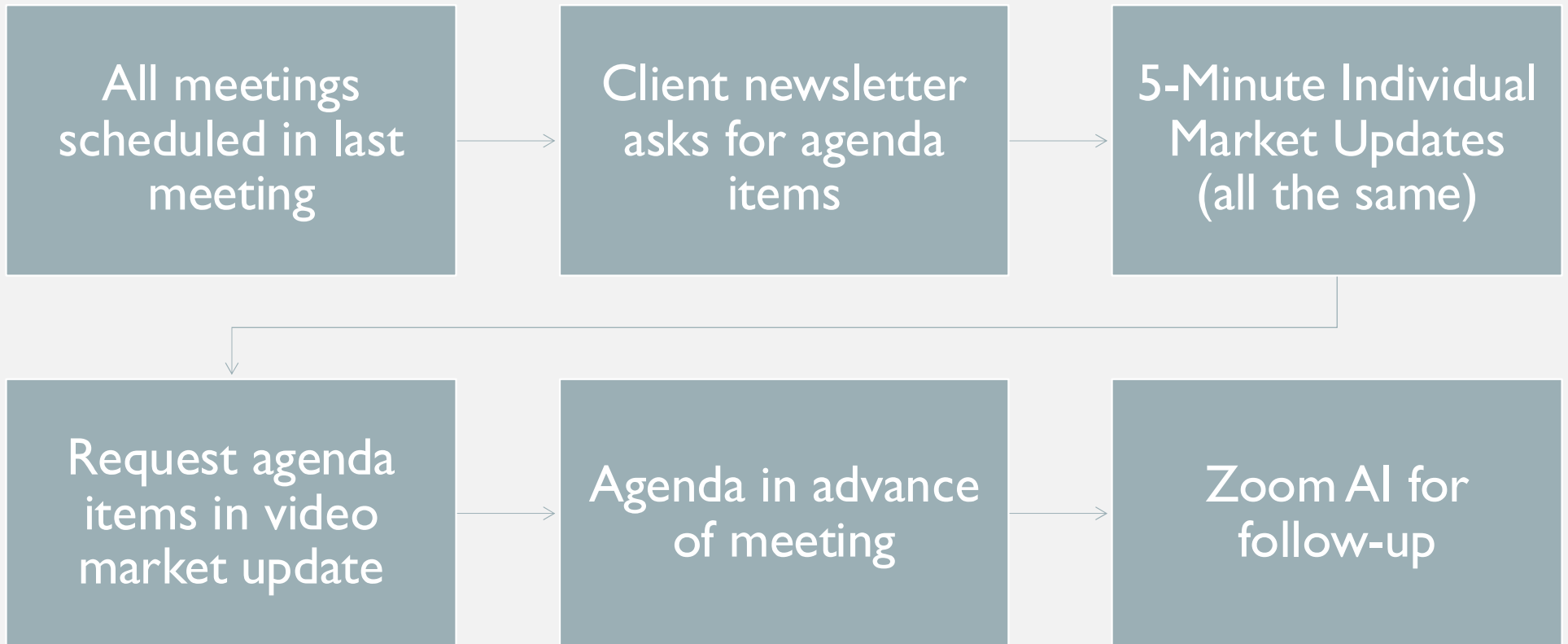


Surge Benefits

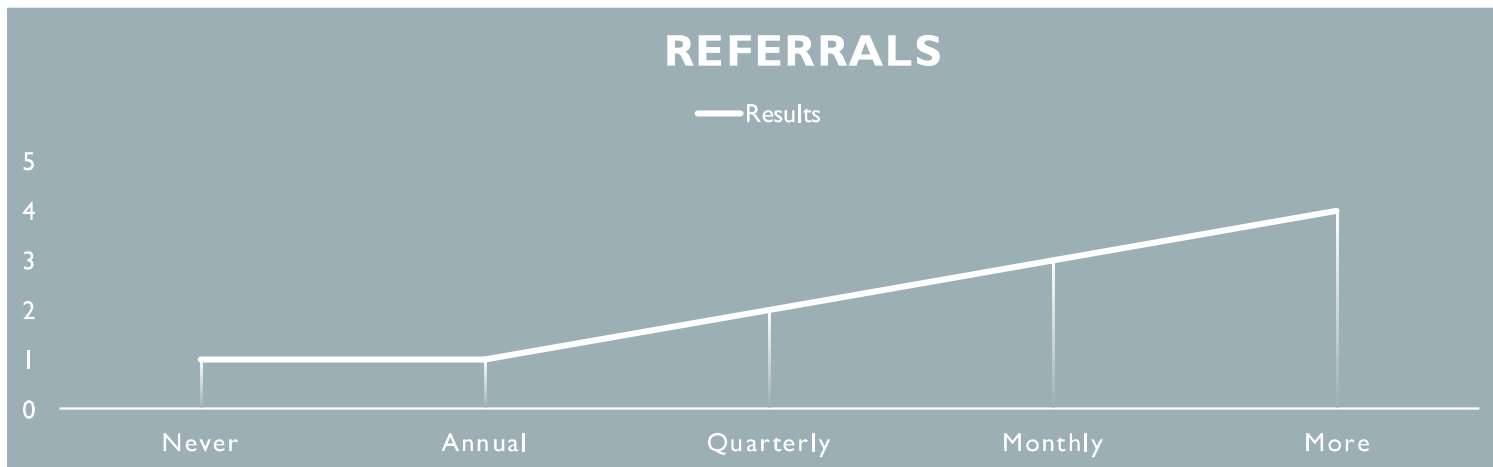
Same conversations
Same Agendas
Same Market Videos
Always book next meeting

GOING AGAINST
THE GRAIN
2X/YEAR

SURGE PROCESS



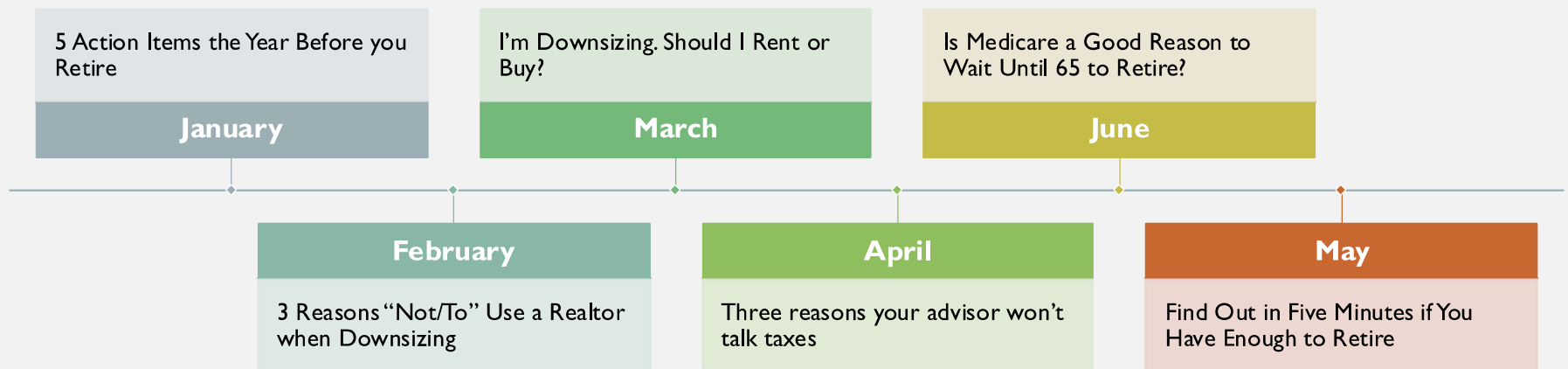
EDUCATIONAL: PLANNING



Client Name(s) First name, last initial	Age(s)	Age(s) when hired	What transitions were they navigating when hired?	What questions did they need answered?	Business owner/employee/retiree	Employer (if applicable)	What questions did they ask in your last review (don't list investment questions)

**EDUCATIONAL: PLANNING
WHY DID YOU GET HIRED?**

TRANSITION COMMUNICATION





Which Retirement Accounts Should You Withdraw From First?

Here's a standard order for when you should tap which account when you're in retirement.

BY EVAN T. BEACH, CFP®, AWMA® • PUBLISHED 19 DAYS AGO



Leaving an Inheritance? Is It Better to Give to Kids Now or Later?

Retirees should secure themselves first, and if you're all set there, then consider a few other things, such as the impact on the kids and tax issues.

BY EVAN T. BEACH, CFP®, AWMA® • PUBLISHED MARCH 07, 2023

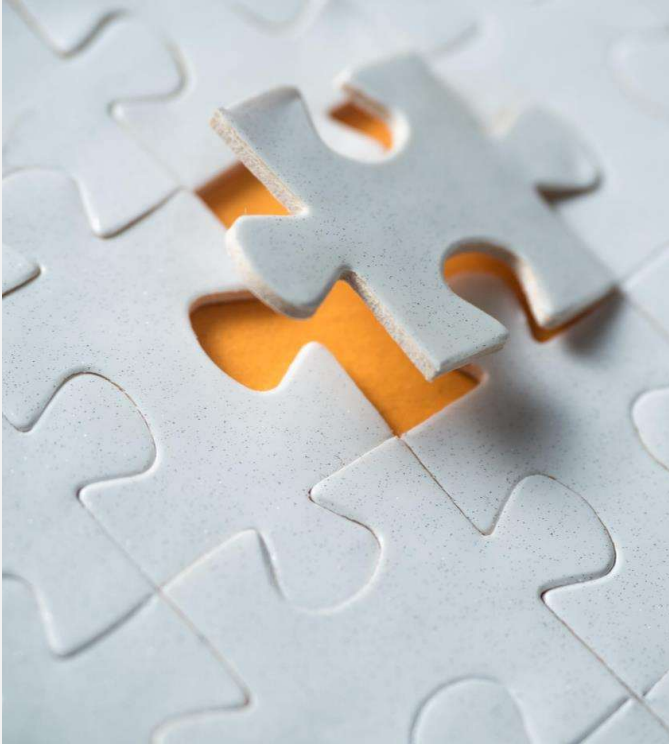


Should I Sell or Rent My House When I Relocate for Retirement?

This decision isn't easy, thanks to investment, tax and other considerations. Let's explore the implications of each.

BY EVAN T. BEACH, CFP®, AWMA® • PUBLISHED FEBRUARY 27, 2023

MY APPROACH



GREETING CARDS & PERSONAL NOTES

68%

Some Thoughts:

- **DON'T COMPETE WITH PIZZA**
- Think experiences
- Anniversaries, kids birthdays, trips, books.



NON-EDUCATIONAL HOBBY & INTEREST

HOBBY & INTEREST:
QUARTERLY BASED ON CLIENT INTERESTS



Referrals



Trust & Retention

HOBBY & INTEREST STRATEGY

Client Communities



Grandkids



Food & Wine



Travel



Volunteering

Sample Evidence-Based Client Service and Communication Schedule

Communication Type	January	February	March	April	May	June
Education: Investment	Video summary	Blog	Video summary	Blog	Video summary	Blog
Education: Non-Investment	Article	Article	Article	Article	Article	Article
Interest and Hobby		SIG event(s)			SIG event(s)	
Scheduled Meetings					Investments	
Total Touches: 30 per year	2	3	2	2	4	2

Communication Type	July	August	September	October	November	December
Education: Investment	Video summary	Blog	Video summary	Blog	Video summary	Blog
Education: Non-Investment	Article	Article	Article	Article	Article	Article
Interest and Hobby		SIG event(s)			SIG event(s)	
Scheduled Meetings				Planning		
Total Touches: 30 per year	2	3	2	3	3	2

IN SUMMARY



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<https://talk.ac/evanbeach>

and enter this code when prompted

FPA

