FIELD GUIDE 01 / PRIVATE CLIENT EDITION

The Webinar *Growth* Guide

Build an educational client-acquisition channel around the expertise you already have.

Ashby *& Vane*

Build the system. Own the channel. Grow the practice.

THE OPPORTUNITY

Attention is common. Intent is different.

Most financial marketing asks a prospect to trust an advisor before the advisor has had the opportunity to teach them anything.

An educational webinar changes the order. A prospect chooses a topic, commits time, hears your point of view and learns how you think. The first meeting no longer has to begin with a cold introduction. It can continue a conversation that has already started.

> *"Your expertise is already the asset. The system puts it in front of the right prospective clients."*

What a strong webinar system does

01 Attracts people around a specific financial decision

02 Builds familiarity before a one-to-one conversation

03 Creates a measurable path from registration to meeting

04 Produces reusable educational assets for ongoing campaigns

THE SYSTEM

Five stages from expertise to conversation.

01 **Choose a decision, not a broad subject.**
Focus on a real question your ideal prospective client already wants answered.

02 **Build a clear registration promise.**
Explain what attendees will understand or be able to evaluate after the session.

03 **Teach with a point of view.**
Show how you frame the problem, the tradeoffs involved and the mistakes worth avoiding.

04 **Create a natural next step.**
Offer a relevant conversation for people who want to apply the education to their own situation.

05 **Follow up while the context is fresh.**
Use concise reminders, a replay and personal outreach tied to the topic they selected.

The webinar is not the entire strategy. The acquisition system around it is what creates consistency.

TOPIC SELECTION

A strong topic signals who the session is for.

Effective topics are narrow enough to feel timely and substantial enough to justify attention. They connect a financial concern to a decision the attendee may need to make.

Useful topic traits

- Relevant to a defined life or market moment
- Specific enough to promise a clear takeaway
- Connected to the work your practice wants more of
- Educational without pretending every attendee has the same answer

Avoid

- Broad “financial planning 101” themes
- Fear-led claims or manufactured urgency
- Outcome promises
- Topics chosen only because they are easy to present

A practical framing formula

> *How [a defined audience] can evaluate [a consequential decision] before [a relevant moment].*

Examples might address retirement-income decisions, tax-aware planning questions, transition events, or the choices that follow a major liquidity event—subject to your firm’s compliance requirements.

MEASUREMENT

Measure the whole path—not a single number.

Registration rate

Does the topic and invitation earn attention from the intended audience?

Attendance rate

Do reminders and positioning convert interest into committed time?

Engagement

Do attendees remain, ask questions and respond to the material?

Conversation rate

Do qualified attendees take or accept a relevant next step?

Review questions after every campaign

01 Did the campaign attract the market the practice intended to serve?

02 Where did the largest drop-off occur?

03 Which questions showed the strongest decision intent?

04 What should be retained, revised or removed before the next session?

NEXT STEP

Build a channel you control.

Ashby & Vane builds educational webinar client-acquisition systems around the expertise financial advisors and wealth managers already have.

Run the system yourself after a setup intensive, or engage our team to manage the campaigns for you.

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