



HIGH-NET WORTH

Passion Prospecting



SETH STREETER

MISSION  WEALTH[®]

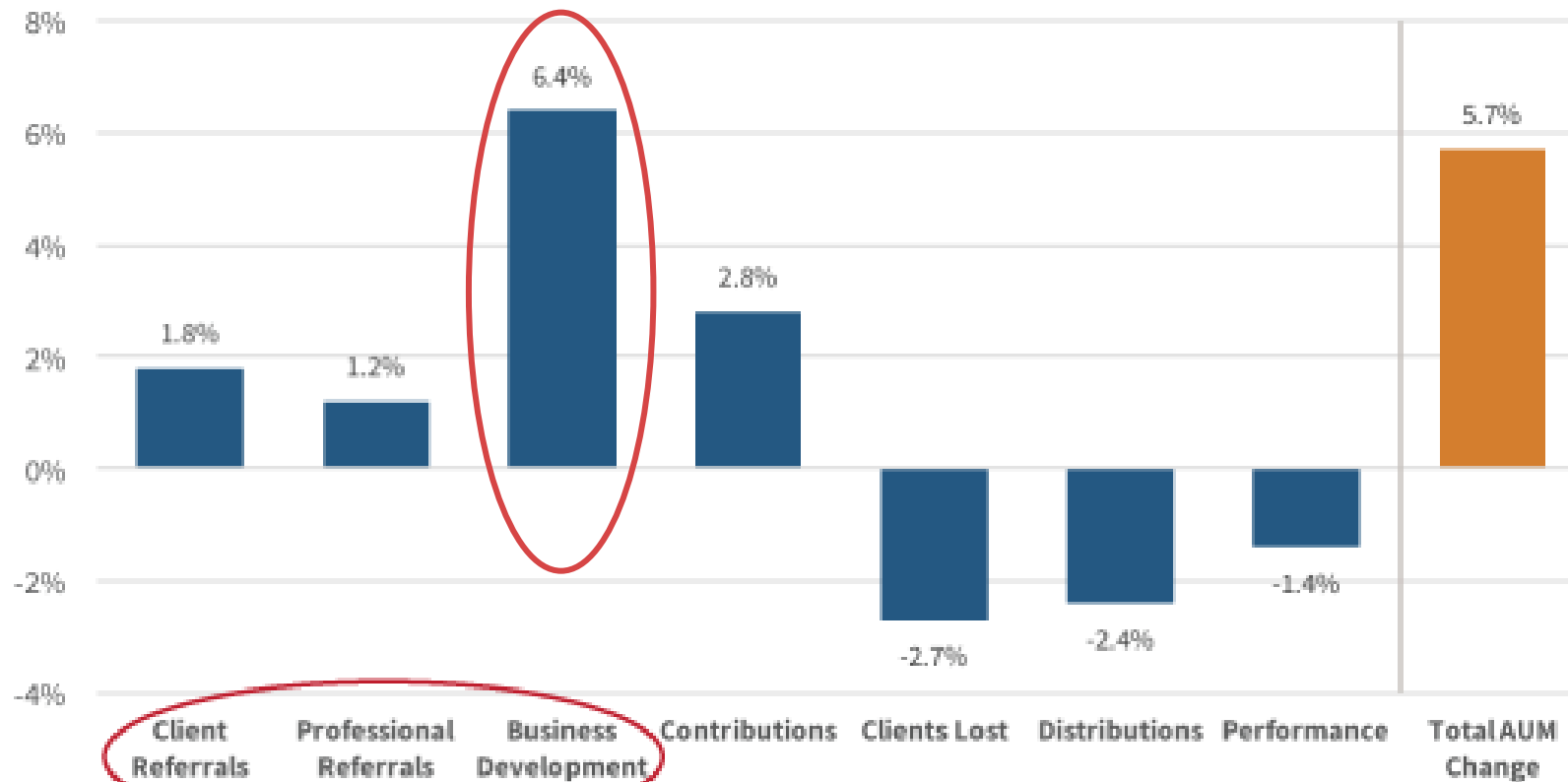
Your goals. Our mission.



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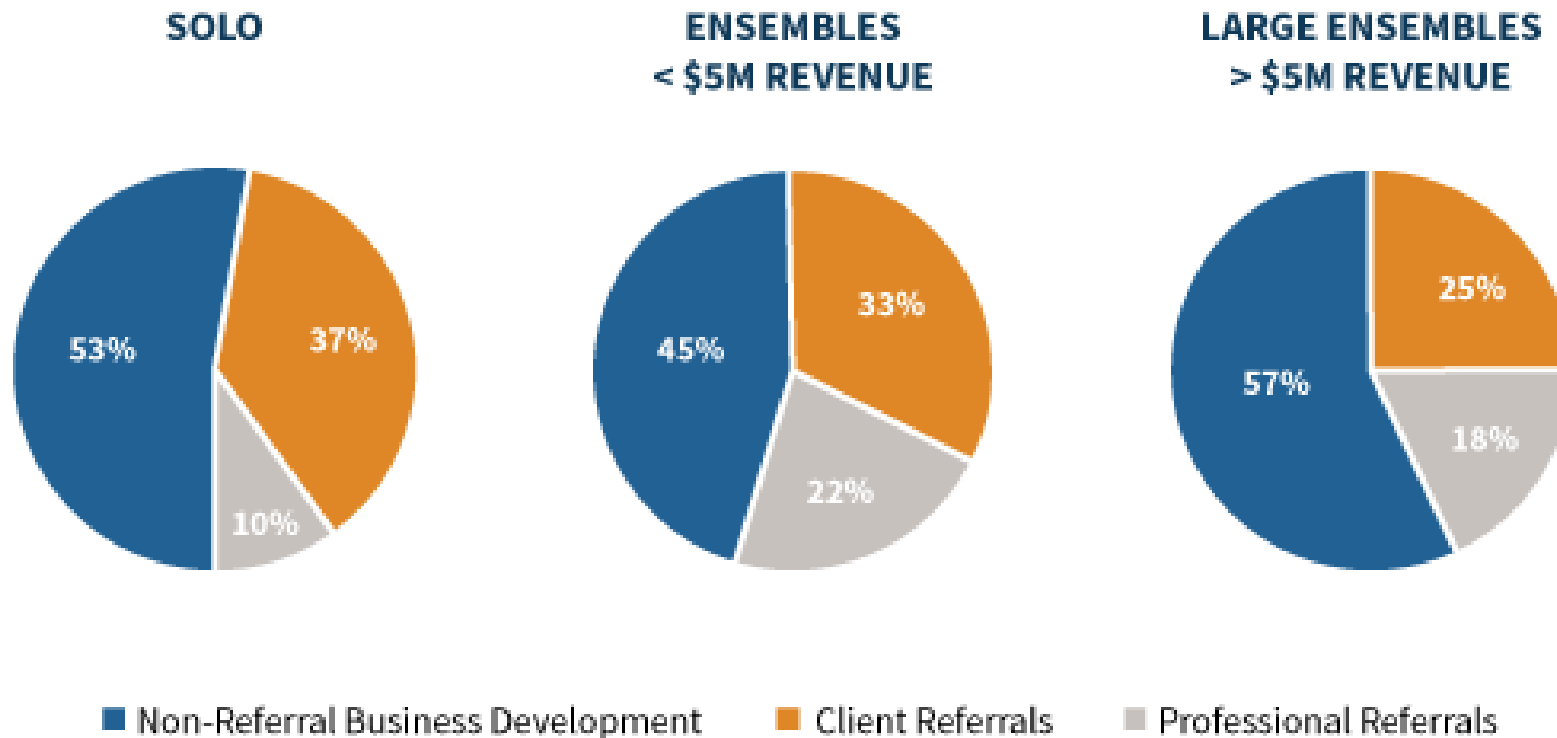
BREAKDOWN OF TYPICAL ADVISORY FIRM'S AVERAGE % CHANGE IN AUM IN 2015



© Michael Kitces, www.kitces.com

Source: InvestmentNews, 2016 Financial Performance Study Of Advisory Firms

AVERAGE ADVISORY FIRM'S NEW ASSETS BY REFERRAL SOURCE IN 2015



© Michael Kitces, www.kitces.com

Source: InvestmentNews, 2016 Financial Performance Study Of Advisory Firms



Making
MISSION WEALTH:
A 2-PART PLAN



1. *Passion* PROSPECTING

Are you wondering:

1. Who are you?
2. How to you get exposure?
3. How do you nurture it?

2. *Traditional* COIs

Join the conversation in the
Cultivating COIs session next!

“ KIDS' CAUSES ”

“ YPO ”

“ OCEAN SWIMMING ”

“ COMMUNITY ORGANIZING ”

“ INSPIRED LIVING ”

“ SUSTAINABILITY ”

“ MINDFULNESS ”

“ ENTREPRENEURSHIP ”

SantaBarbara

Preliminary STEP: "Know thyself."

GETTING CLIENTS DOING WHAT YOU LOVE

Use the below worksheet to start gathering ideas and implementing actions that you can use to improve your personal networking and gain clients doing what you love.



WHAT DO I LOVE (HOBBIES, INTERESTS, CAUSES, ETC.)?

Blank blue response area for "WHAT DO I LOVE (HOBBIES, INTERESTS, CAUSES, ETC.)?"

WHERE ARE MY PEOPLE (IDEAL CLIENTS)?

Blank blue response area for "WHERE ARE MY PEOPLE (IDEAL CLIENTS)?"

WHO IS MY FOCUS LIST? START WITH YOUR TOP 10!

Blank blue response area for "WHO IS MY FOCUS LIST? START WITH YOUR TOP 10!"

HOW CAN I SUPPORT MY COMMUNITY?

Blank blue response area for "HOW CAN I SUPPORT MY COMMUNITY?"

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LIFE EVENTS *Focus*

SIZE &
SCALE
CREATES
FOCUS
AREAS AS
OPPOSED
TO ONE
NICHE.

- 1 Business owners
- 2 Independent women
- 3 Retirees
- 4 Professionals
- 5 Socially responsible (ESG) investing
- 6 Life-centered planning (holistic wealth)

MARKETING, RESOURCES & EVENTS
FOR EACH OF THESE



THE HIGH-NET WORTH *Passion Prospecting Process*

must be organic and authentic.

1

Connect authentically.
Be a capable contributor.

Nurture the next step

2

Be validated.

Nurture the next step

3

Follow through to cultivate connection.

Nurture the next step

4

Invite & show up.

Nurture the next step

5

Fact find conversationally & plant seeds.

Step 1: CONNECT AUTHENTICALLY.



Ocean Swimming > Santa Barbara Channel Swimming Association

Conservation > Land Trust Event (7 companies)

Non-Profit Accelerator > Fast Pitch SB

Community Networks > Sustainable future;
Inspire Santa Barbara;
Tea Fire Fundraiser



Your passions > Your actions

Look For Synergistic,
Integrative Opportunities

SHARE VIA CHAT

BE A CAPABLE *Contributor.*





Step 2:
BE VALIDATED

Be able to be pass discovery through LinkedIn, website, Google and posted articles to keep the door open.
Don't be vanilla; tell *your* story!



Step 3:

FOLLOW THROUGH TO CULTIVATE CONNECTION

The more you give, the more you receive.
Personalized, follow-up communications.
Have fun!





Step 4:
**INVITE &
SHOW UP**

Share any events that may resonate.
Show up to events that they are part of.
Shared passion is contagious!



Step 5: FACT FIND CONVERSATIONALLY

Find natural opportunities to plant seeds.

- 🌱 "My day? Well..."
- 🌱 "Guess I'll stick to my day job of..."
- 🌱 "What's your game plan when..."
- 🌱 "Today, I helped my client overcome their fear about..."
- 🌱 "Have you heard about..."

FAILURE *Formula*



SUCCESS *Formula*



PUTTING INTO PRACTICE

1. Get clear about your passions, hobbies and causes through the "Getting Clients Doing What You Love" exercise.
2. Connect authentically through channels you are passionate about.
3. Make sure you are able to be validated favorably by prospects through social media/Google.
4. Follow through and show up, practicing conversational fact finding.

RESOURCES

Getting Client Doing What You Love

RECOMMENDED READING

- Use 'Passion Prospecting' to Boost Your Business, and Yourself, Holly Batchelder
- Seth Streater on His Evolution From Managing Money to Redefining Wealth for Himself, Clients, and Staff, Steve Sanduski
- The Untethered Life: Wealth Redefined, Seth Streater, TEDx Santa Barbara
- Seth Streater on Wealth Consciousness, The Beyond Capital Podcast
- Wellness Revolutionaries: A New Definition of Wealth with Seth Streater, Mindbody Business

ASK SETH ON COACHING CENTER:

September 21-25



Q&A

JOIN SETH & ANDREW FOR PASSION PROSPECTING BREAKOUT LATER TODAY