**Elevator Pitch Template**

**Elements to include in creating an elevator pitch**

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| --- | --- |
| **Problem** | [Client Type] is often frustrated about how to choose the right Independent Financial Adviser |
| **Solution** | [Your New Solution] eliminates the need to revert to [Client’s Old Solution]” |
| **Why You** | “For [Duration], [Client Type] has trusted [Your Company] to provide the best solutions for the client.” |
| **Value** | ” With [Financial Planning advice], you can [worry less/get better returns on your investment, plan better for the future” |
| **Call To Action (CTA)** | “I’ll give you a call to learn more about your situation (Get Contact Info). [Give out your business card]. Thanks for your time.” |

**Elevator Pitch Template**

**Elevator Pitch for Persona 1 “Add Name”**

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| --- | --- |
| **Problem** | [Client Type] is often frustrated by the effort it takes to [Action]” |
| **Solution** | [Your New Solution] eliminates the need to revert to [Client’s Old Solution]” |
| **Why You** | “For [Duration], [Client Type] has trusted [Your Company] to provide the best solutions for the client.” |
| **Value** | ”With [Your New Solution], you can [spend less/make more] [time/money] [Action].” |
| **Call To Action (CTA)** | “I’ll give you a call to learn more about your situation (Get Contact Info). [Give out your business card]. Thanks for your time.” |