



**JUBILEE**

CELEBRATING 20 YEARS



# Sales Lightning Rounds

Jesse Taylor

**Senior Vice President,  
Business Development**



## Rules of the Game



- No personal attacks
- No making fun of Jesse and Brian
- No eye gouging, fish hooking or strikes to a grounded opponent
- No using ChatGPT

~~Winning isn't everything...~~

*...it's the only thing*

- 4 minutes per person
- Order selected at random
- Judges will vote for best pitch



# Judges



**Charlie Epstein**



**Courtney Milner**



**Duncan Purvis**

# **Sales Lightning Rounds**





# Go for a No!

Stop wasting time  
and money when selling

**Brian Roberts, CFA**

Senior Vice President



**If you're looking for more**

**Sales**

**Time**

**Income**



**A “no” is one step closer to a “yes”**

**Increase  
Sales**

**Streamline  
Productivity**

**Improve  
Profits**

**Missing steps that can  
get us to a “No”**

# We're good at

Building  
Relationships

Identifying  
Opportunities

Fixing  
Things



# “Telling” isn’t “selling!”

Wasted  
Time

Wasted  
Expenses

Educating  
Someone’s  
In-law

# Good news! This is avoidable IF...

- Don't provide answers until you've determined INTENT
- Aren't afraid to ask your prospect to HIRE YOU
- Use TRIAL CLOSES and NEXT STEPS to identify INTENT

# Snapshot Report

- **ASSESSES KEY AREAS** of fiduciary responsibility
  - Provides a logical “**NEXT STEP**”
  - Identifies “**DECISION-MAKERS**”
  - Confirms “**INTENT**”
- Outlines **SPECIFIC AREAS TO IMPROVE** a plan



# **Sales Lightning Rounds**





# **Sales Lightning Rounds**





**Alex Kahn**

Sr. Investment Advisor

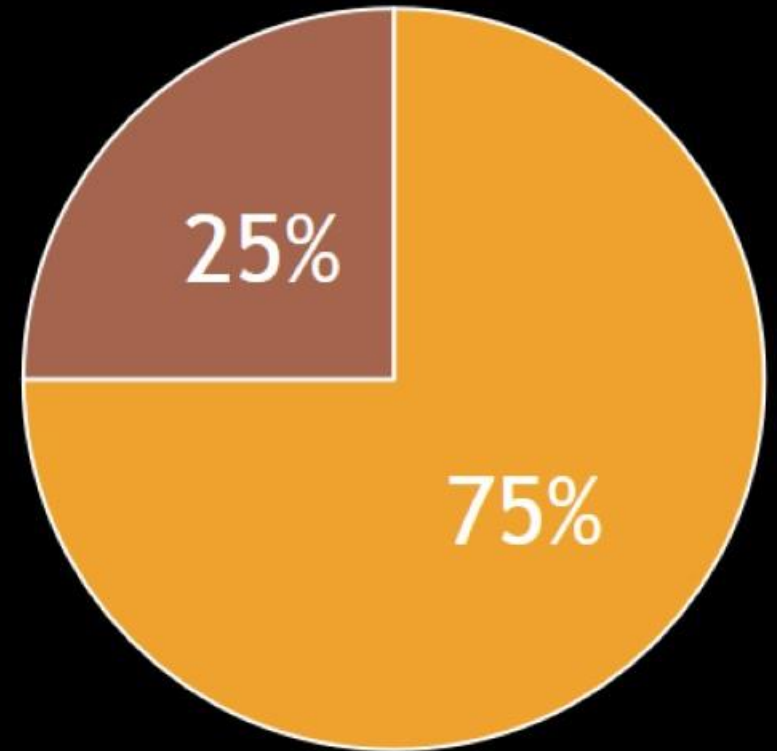
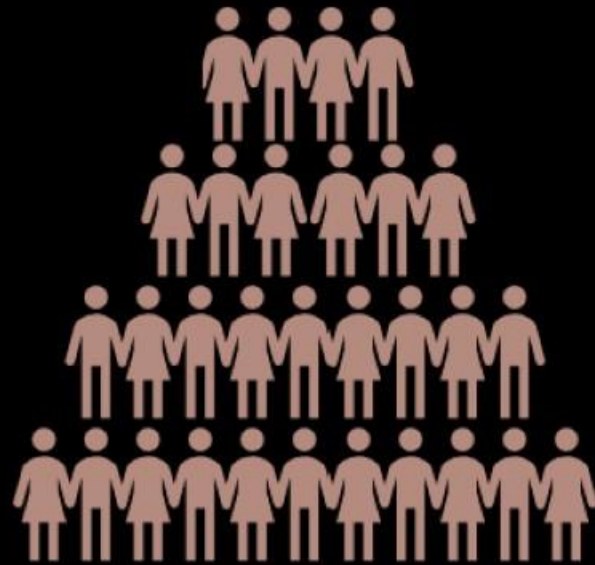


# A day in the life with Alex

1 of 3



30





MELODY RAVANIPOUR

Microsoft Teams audio



Decline



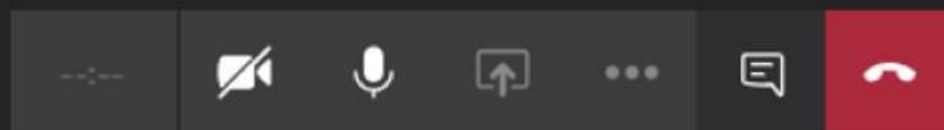
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## Discover Your PATH

### Need help choosing a PATH to retirement?

That's where the Discover Your PATH Tool comes in.

Click "Get Started" to find the portfolio that corresponds with your expected retirement date and need to take investment risk. You can also see how its allocation of stocks and bonds is expected to change over time.

Get Started

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# **Sales Lightning Rounds**



**ROE = Return on Energy**  
**Average Rev. on Plan = \$10k - \$25k**  
**Advisor Hourly Value = \$350**

**How Much Time Can You Afford to Waste?**

**Luke Vandermillen**

Director, Business Development



# **Sales Lightning Rounds**



# Grow Your Practice by Growing Your Team!

**Ellie Armstrong**

Investment Analyst



# ***Calculating Votes***

*Ellie Armstrong*





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