

CLIENT STORY: IRON POINT FINANCIAL | FINANCIAL PLANNING

PATHWAY GROW BEYOND REFERRALS

A Financial Planning Firm Found Its Focus in the Different Needs of the People It Serves

CLIENT STORY SUMMARY

From Reaching Everyone to Knowing Where to Focus

CHALLENGE Greg wanted to serve everyone well, so his marketing tried to reach everyone at once. It's a common trap in financial advisor marketing: his time, energy and budget were spread in every direction.

SOLUTION Through the Clearsound Suite, we defined four audiences and what each one needs, then built resources around the questions each audience asks.

RESULT Greg knew where to focus. His team has resources for each season of life, and reaching the first goals opened the conversation about new ones.

> "Finally, had a point in my career where I feel like I could breathe. It's great."
>
> Gregory A. Liszka, CFP®, RICP® · President, Iron Point Financial

RESULTS

4

distinct audiences, each with its own questions and its own next step

AUDIENCE SERVED
Financial Planning

SERVICES PROVIDED
Clearsound Suite · Website Development · Audience Strategy · Audience Resources · Ongoing Marketing Partnership

WHERE IT STARTED
Clearsound Suite, 2017

"

WORKING TOGETHER

We transformed a chaotic marketing plan into a clear and precise process!"

Gregory A. Liszka, CFP®, RICP® · President, Iron Point Financial

NEXT STEP

Ready to Know Where to Focus?

Start with one conversation about the people you serve best.

Start the Conversation →

Or call 724.674.8355