FINANCIAL ADVISORS:

WELCOME

TO A PEEK INSIDE THE ASCEND™ PROGRAM

Featuring your LinkedIn 2-Step DM
Cheat Sheet™ Playbook

Advisor1st®

"LinkedIn 2-Step DM Cheat Sheet™" for Financial Advisors

Turn dead connections into booked calls in under 60 seconds.

The Problem:

You're connecting with people on LinkedIn… but then what?

The convo dies. The feed's a ghost town. And your calendar's still empty.

Most financial advisors try to "build rapport" or "warm people up"… but let's be real:

You don't need more 'nice connections' —you need more conversations that lead to clients.

The Solution: The 2-Step DM That Starts Real Conversations

Use this proven, 2-step message to turn cold, dead LinkedIn connections into warm coffee chats that lead to real business.

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STEP 1: The Written DM (Pick One & Personalize)

If you have your new niche already in your first level connections, you'll focus on those FIRST until you run out with the same message in the previous step.

If you don't have any people in your niche you're connected to, you'll focus on people you know you can help, and set up coffee chats with them.

1. Take your Sales Navigator list and customize it to show only 1st level connections
    a. Active on LinkedIn
        i. If not many, remove this option
2. Open 20 tabs from the results
3. Click on the profile
4. Click to look at comments section and posts
5. Engage with 2-3 comments or posts
6. Write a personal outreach message to the person and offer a coffee chat
7. BONUS: Send the written message that is short and follow up with a voice message (examples below) using the app
8. Rinse and repeat 20 times

Choose your angle and plug in a few quick details (we've done 90% of the work):

LINKEDIN COFFEE CHATS

All messages below are designed for existing LinkedIn connections. The tone is professional yet down-to-earth, and each version invites a 15-minute virtual coffee chat. These swipes include variations with and without the TED speaker mention.

VERSION 1: POINT OF INTEREST + CHAT INVITE

Hey [First Name],

I noticed [insert something interesting from their profile or recent post] — really enjoyed that. I recently joined a program to help me use LinkedIn more intentionally, and part of that is doing five virtual coffee chats a week with people I'm already connected to.

Would you be open to a quick 15-minute chat sometime soon? Just to catch up and see if there's any synergy between our networks. Cheers,
[Your Name]

VERSION 2: GOOD PROFILE + CHAT INVITE

Hey [First Name] — still one of the better profiles I've seen on here. Most are either missing a headshot or rocking one from 20 years ago at Sears haha.

I'm on a mission to connect more intentionally and just joined a program that encourages weekly virtual coffee chats.

Thought of you since we've been connected here for years — would you be open to a quick 15-min chat to catch up and see if there's room for collaboration or referrals? Cheers,

[Your Name]

VERSION 3: RESEARCH ANGLE + CHAT INVITE

Hey [First Name],

I've been diving deeper into the [niche/industry] space and noticed your experience really stands out. As part of a program I just joined, I've set a goal to have weekly 15-minute coffee chats with people already in my network.

No agenda—just thought it'd be great to connect briefly and explore any mutual opportunities.

Interested?

Cheers,
[Your Name]

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STEP 2: BONUS VOICE MESSAGE (OPTIONAL BUT 🔥🔥🔥)

Right after the written DM, follow up with a short voice note using the LinkedIn mobile app:

> "Hey [First Name], just wanted to follow up real quick—totally understand if you're busy, but figured I'd extend a quick invite for a casual coffee chat. No pitch, just people connecting. If that sounds good, I'll send over a link or send me yours."

This 1-2 punch boosts replies massively—because it feels human, not salesy.

🧭 What to Say on the Call:

No pitch. Just be helpful.

Ask:

- “What kind of clients are you working with lately?”
-
- “What’s your biggest growth goal this year?”
-
- “How can I support what you’re doing?”

Often, they’ll ask back—and boom, you’re in a real convo. Craft a short, high value Unique Sales Proposition that tells them what you do so they will be curious, and tell them that when you say what you do.

Congratulations, you’re getting more qualified leads with this simple DM script.

Now imagine if you had a full, step-by-step process to convert those leads into high-ticket clients without ever feeling pushy - taking you from five to six figure months.

We cover all of that in my Ascend Private Community.

Just message me on LinkedIn with the word: “Details”

I’ll send over a private behind-the-scenes breakdown, a few case studies from advisors like you, and we can see if we’re a fit.

No pressure. Just clarity.

Thanks for reading,

Jeremiah D. Desmarais
#1 Author, TED Speaker, Philanthropist, Dog Dad
CEO, Advisorist®

2024 - Think Advisor Luminary Nominee
2023 - Future Proof Media Partner
2023 - Fast Company "Most Innovative Workplaces"
2023 - Inc 5000 Fastest Growth Companies
2022 - Inc 5000 Fastest Growth Companies #189 in Business Services
2022 - Inc. Ranked "Best in Business"

What Advisors are saying:

"All in, last year, I brought in $1.1M in fees and commissions from AUM, annuities and life insurance, and went from working 4 days a week down to 1.5 days a week of work. You have changed my life." - Gene B. Financial Planner, TN*

"$4M AUM + $10,000 in commissions from this process. I love waking up and just seeing appointments pop up on my calendar!" - Pamela J. Sams, BFA™, CRPC®, MBA*

"I have a referral coming in tonight with over $1MM of new assets!" - Larry Gatz, CFP*

"I just moved $200k into 2 different annuities and a perm life policy. Another just wired $300,000 to 2 different annuities." - Todd Friedman, Lakewood, WA*

"I'm seeing 7 people a week because that's all I have time for. I had to open my calendar for more spots!" - RJ, Washington DC*

"Launched my first campaign less than 48hrs ago... I received my first 2 YES this morning!" - Kimberly Taylor, CFP*

"I'm averaging 5-6 appointments a day, and adding about $40,000 a month." - Michael Y. Employee Benefits

"I'm up $500k a year with more free time. No more chasing down leads." - Paul N. Financial Planning, AUM, High End Life, Investments

"I've had up to 9 meetings a week! I don't have a marketing problem anymore." - Goeff K., Financial Planning, Retirement, AUM

"This service has been my secret for the past 5 years." - Ken K., Top 1% Producer, Life Insurance & Financial Planning, AUM

"I am averaging 4 calls a week in about 3 weeks since launch....I have already had 2 sales!" - Bryan B. Financial Planner

"I get 5 appointments a month without doing anything." - Ryan M., Wealth Advisor, Marina del Rey, California

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