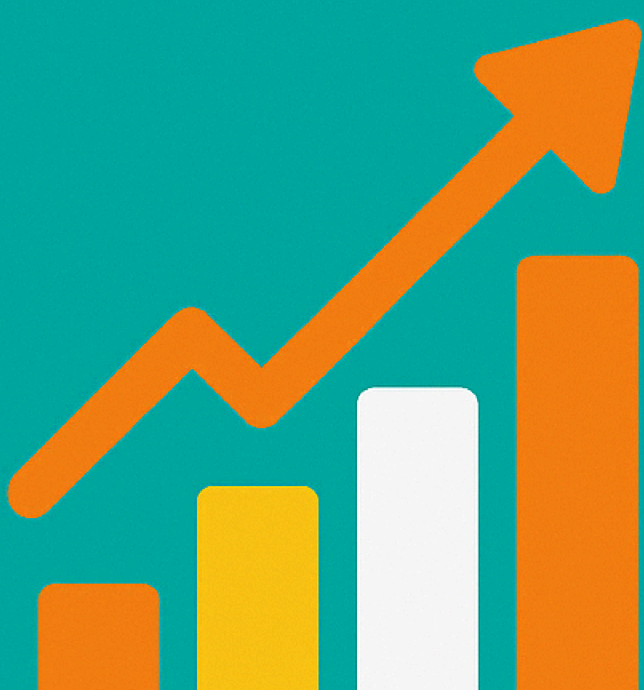
THE FIRST 5™

3 PLUG AND PLAY SECRETS TO YOUR NEXT 5 APPOINTMENTS IN 7 DAYS



WELCOME TO THE FIRST 5™

If you're reading this, you're about to unlock a game-changing strategy: landing your first 5 quality appointments in just 7 days — without cold calling, buying leads, or dumping money into ads.

Each "plug and play" method inside this guide can be launched in about an hour. They're simple, actionable, and based on real-world strategies top advisors are already using — but without the heavy lifting.

These aren't gimmicks. They're small levers that create big momentum.

Inside you'll find:

- A LinkedIn DM strategy that's natural, non-salesy, and high-converting
- A warm-up email campaign proven to revive cold leads and open new conversations
- A simple, personal referral ask that taps into the highest-trust opportunities

Ready to get started? Let's go.

THE FIRST 5

Secret #1

LINKEDIN DMS – THE 5-A-WEEK RESOLUTION

Why LinkedIn?

According to a 2023 report from Business Insider Intelligence, LinkedIn users have 2x the buying power of the average web audience.

For financial advisors, LinkedIn isn't just another platform — it's the platform.
Cogent Research found that more than 60% of high-net-worth investors (assets $500K+) use LinkedIn to research advisors before making decisions.

In short: LinkedIn is where high-value prospects are actively looking for solutions — and where they expect to meet you.

Yet most advisors use it wrong: hard pitches, spammy DMs, generic connect requests.

This "resolution" method flips the script.

THE STRATEGY

THE STRATEGY

You're simply making a professional resolution to expand your network, five genuine connections at a time. No pitch. No pressure.

CONNECTION MESSAGE (COPY/PASTE TEMPLATE)

Hi [First Name],
I'm making a simple resolution this year: to connect with 5 like-minded professionals each week — no sales pitch, just to explore natural synergies between our work.
Would love to connect if you're open to it. Wishing you a strong year ahead!
— [Your Name]

NUDGE 1 (AFTER CONNECTION, NO REPLY)

Thanks for connecting, [First Name]! Curious — what's your main focus this year? Always like learning about new perspectives.

NUDGE 2 (3+ DAYS LATER)

Hey [First Name], totally understand everyone’s busy. Just wanted to quickly say if you’re ever looking to expand your network or swap ideas, I’m always open. Appreciate the connection either way!

ACTION STEP

- Send 5 of these a week
- Engage naturally
- Invite genuine conversations to a casual Zoom chat when it feels right

Secret #2:

EMAIL WARM-UP CAMPAIGN – REVIVE AND RECONNECT

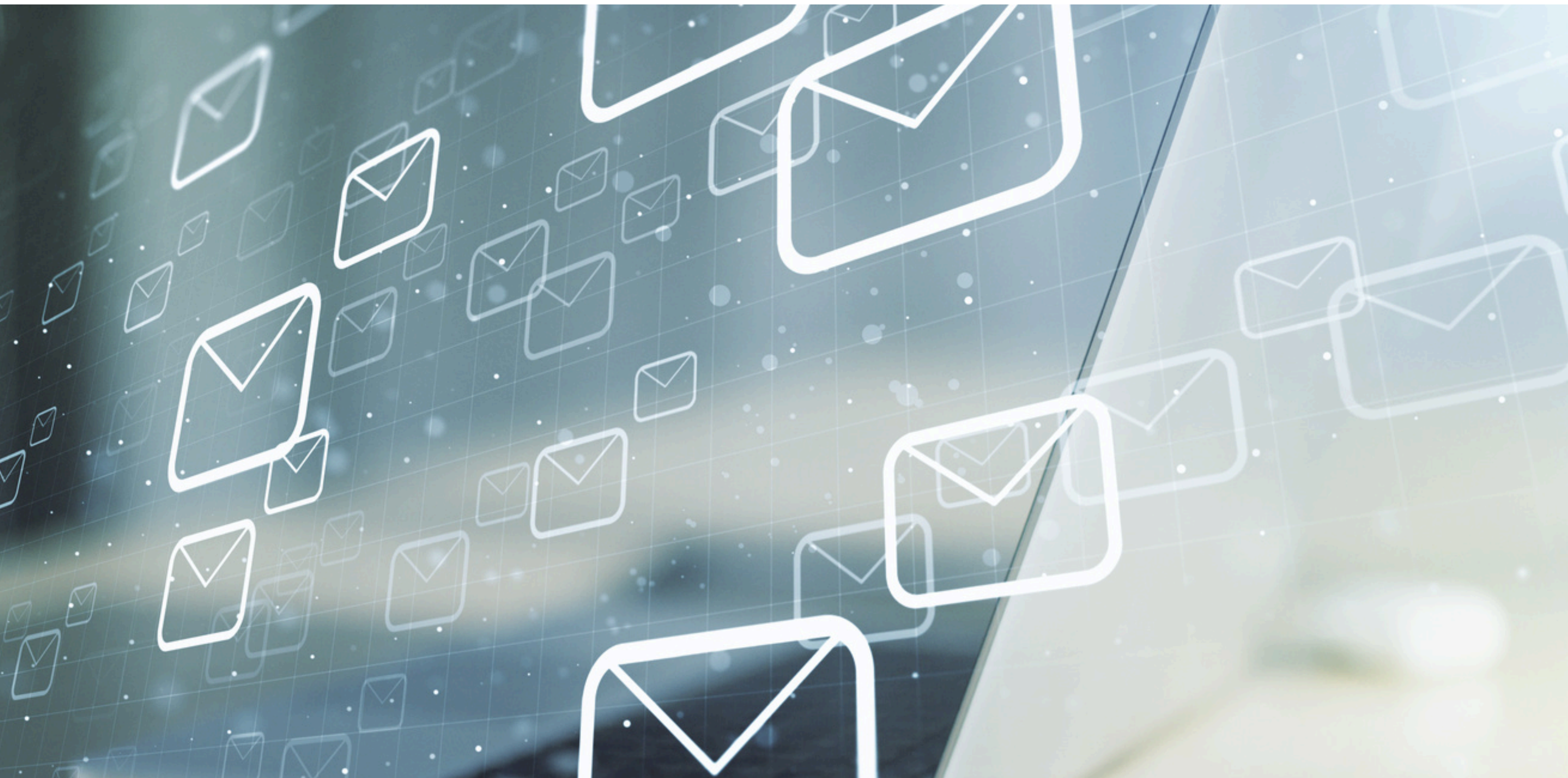
Why Email?

According to McKinsey & Co, email marketing is 40x more effective at acquiring customers than Facebook or Twitter combined.

Moreover, Litmus Research reports that every $1 spent on email marketing generates $36 in ROI — outperforming every other channel.

Most advisors neglect their warm contacts, assuming if someone didn't act immediately, they’re lost. But the reality is: "No" often just means "Not Yet."

The "Revive and Reconnect" campaign taps into that dormant gold sitting right inside your email li



We’re sending a simple, authentic check-in — not a sales letter.

WARM-UP EMAIL #1 (INITIAL TOUCH)

Subject: Quick catch-up?

Hi [First Name],
It’s been a little while! I was thinking of you recently and thought I’d reach out.

I’ve been connecting with a lot of professionals who are planning some major financial moves this year — and it made me wonder if there’s anything new you're working on or planning around [customize: retirement, business planning, investments, etc.].

If you’d like to catch up for a few minutes, let’s schedule a time — would love to hear what's new with you.

Hope you’re doing great!
— [Your Name]

THE STRATEGY

WARM-UP EMAIL #2 (POLITE FOLLOW-UP)

Subject: Anything new on your end?

Hey [First Name],
Just circling back to see if anything new has come up recently that you might want to chat about.
If now’s not the right time, no worries at all — just wanted to make sure I didn't miss anything you might have on your mind.
Wishing you all the best either way!
— [Your Name]

ACTION STEP

- Identify 15–20 past contacts or leads
- Send Email #1 today
- Send Email #2 3–5 days later if no reply

Secret #3

NON-LINKEDIN QUICK WIN – THE CLIENT WARM REFERRAL ASK

Why Referrals?

According to a 2023 YCharts survey, 83% of wealthy investors say they would refer their advisor — but only 29% actually do.
Why? Because most advisors never ask.

Meanwhile, research by Advisor Perspectives shows that referred clients are 4x more likely to become loyal, long-term clients compared to cold prospects.

The key is asking the right way: warm, natural, and non-pushy.

Reach out to 3 of your happy clients this week with a soft, professional introduction ask — not a hard referral request.

CLIENT WARM REFERRAL EMAIL

Hi [First Name],

I've been reflecting recently on how grateful I am for the clients I get to work with — and your trust means the world to me.

I'm making it a point this year to connect with a few more people like you — genuine, thoughtful, and committed to financial growth.

If you know anyone who might value a second opinion or even just a quick chat about their financial plans, I'd be honored if you passed along my name. No pressure at all, of course!

Thanks again for the opportunity to serve you.

— [Your Name]

THE STRATEGY

ACTION STEP

- Choose 3 ideal clients
- Send this personal note
- Follow up gently if they express interest

🚀 Fast Tracker Checklist

WHAT'S NEXT?

If you successfully land your First 5, you're already on the path most advisors never get on: building momentum by organic, authentic, low-stress outreach.

If you want to go deeper and scale your results to 15, 30, even 50+ consistent appointments a month...

You may be ready for the Ascend experience.

Click here to learn more and see if Ascend is right for you.