

Crafting your perfect elevator pitch

Your elevator pitch is your first impression – make it count. Learn how to craft a concise message that captures attention and sparks interest.

What is an elevator pitch and why it matters:

An elevator pitch is a brief, persuasive introduction that summarizes who you are and what you do – all in the time it takes to ride between floors on an elevator.

- **Make an impression:** In a world where attention spans are short, having a clear, concise pitch can help you stand out quickly.
 - **Open doors:** A compelling pitch can turn a casual encounter into a meaningful conversation, opening the door to new opportunities with clients, centers of influence (COIs) and prospects.
 - **Stand out in seconds:** Helps you articulate your unique value clearly and sets you apart from others who offer similar services.
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Crafting and refining your elevator pitch – a step-by-step guide

Step 1: Define your unique value

In just a sentence or two, capture what makes you different and why someone should care. Make it personal, direct and most importantly, make it stick. To help identify your unique value, ask a few of your top clients how they would describe you to a friend. Also, consider framing as a question that is hard to say no to. A few examples:

1. "Have you ever worked with a team of financial advisors who focus solely on helping small businesses grow while helping to build a secure financial future for owners and employees?"
2. "Our practice enables retirees to make the most of their savings, helping turn their nest egg into a reliable income stream so they can enjoy a worry-free retirement."
3. "How valuable would it be to partner with a team that helps you diversify concentrated executive stock positions, can help avoid tax headaches and helps build the security of your financial future?"
4. "We work with wealthy families to help them grow and protect their wealth across generations, ensuring their legacy stands the test of time."

Step 2: Tailor your message to the situation

Your audience changes and so should your pitch. Whether you're at a networking event, talking to a potential client or catching up at a casual gathering, adjust your message to fit the moment. The more attuned you are to your audience, the more your message will resonate.

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Step 3: Focus on solving specific problems

Address a specific challenge or pain point that resonates with your audience. Be clear, concise and persuasive.

1. "I work with small business owners to set up retirement plans that attract and retain top talent – did you know many employees stay for good benefits?"
2. "My mission is to turn retirement savings into a steady income stream so retirees can enjoy life without financial worries."
3. "I assist executives in diversifying concentrated stock positions to help mitigate tax headaches. I can help you reduce risk and secure your future."
4. "I work with wealthy families to help them grow and protect their wealth across generations. Don't risk the loss of family wealth in the second generation and beyond, I can help ensure your legacy stands the test of time."

Step 4: Provide clear next steps

Wrap up your pitch with a straightforward next step, making it easy for them to say yes. Whether you're offering more information, suggesting a meeting or inviting them to connect online, keep it light and direct.

1. "If this sounds like something that could help, I'd love to chat more – when's a good time?"
2. "Let me send you my latest insights on this topic. What's the best email address to use?"
3. "Let's connect on LinkedIn – I share regular tips and strategies that could be valuable to you."
4. "What is your policy on reciprocity?" [for COIs]

Step 5: Practice and refine

Practice until your pitch feels natural and confident but stay flexible. Rehearse with different audiences in mind so you can easily adapt on the spot.

Delivering with impact

- **Be confident:** Deliver with conviction and authenticity to sound natural and engaging.
- **Stay flexible:** Adapt based on audience reactions. Be ready to adjust your message on the spot.
- **Keep it brief:** Aim for 30–60 seconds.
- **Integrate into your website and social media:** Consider creating a short video.
- **Avoid jargon:** Make it easy to understand.
- **Highlight your value:** Focus on how you help clients, not just your credentials or experience.
- **Conclude by outlining a clear next step:** Schedule a meeting or connect on social media.

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