

CONCISE . CONSISTENT . CONFIDENT

INVESTOR PRESENTATION WORKSHOP



A professionally-led, interactive session that puts you in control of every opportunity.

You have one chance to tell your story. It needs to be concise, consistent and told with confidence. With the skills learned in our Presentation Workshop, you'll appear trustworthy and approachable. We'll help you build storytelling skills, establish rapport, and generate sales.



Message Development

- Focus on your value proposition and key differentiators
- Put what you want investors to know about you into plain English
- Explain your process appropriately to any audience
- Create a consistent voice for your firm



Presentation Coaching

- Create a plan for the coming period
- Prepare for what institutional and accredited investors are likely to ask
- Plan your responses to highlight how you're making money for investors
- Receive valuable feedback



Delivery Tips

- Deliver your message even when asked the "wrong" questions
- Sound smart, appear trustworthy, and be persuasive
- Be consistent
- Cut five minute answers to one.
- Be prepared, be confident

Why Choose Us

Our programs are designed to help you attract, maintain, and grow assets. We have a robust practice that spans 30 years working with the financial industry. Our core services include public relations and comprehensive digital and print marketing services from strategy through design and execution.