

KEN VAN LEEUWEN

THE TOTAL WEALTH ADVANTAGE

Packaging a “program” helps financial advisor stand out from other financial planners

Packaging his services as a “program” has helped Ken Van Leeuwen, a successful financial planner in Princeton, New Jersey, stand out from the thousands of other financial planners in his marketplace.

“Financial planning is an innocuous phrase,” Van Leeuwen says. “Everyone says they are a financial planner—from the person at the bank to high-end financial advisors. That’s why we branded our services as *The Total Wealth Advantage*: we are now perceived as different, with something more different and more valuable to offer.”

“Packaging our services as a program clarifies for our clients what we really accomplish. They feel part of a special process, and appreciate that they are not just doing financial planning: they recognize that they are participating in *The Total Wealth Advantage*.”

Since packaging his *BIG Idea*, more than 20 high-end clients have joined his program. “The return on investment has been excellent. We are very, very selective in the types of clients we are looking for, so 20 high net-worth families is an incredible result for us.”

“That’s why we continue to work with *BIG* on a regular basis. It gives us an accountable structure to keep working on the branding, packaging, and marketing of our business: an area that is sadly neglected by most financial advisors.”



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