



CALEB GUILLIAMS

FOUNDER AND CEO OF BETTERWEALTH

February 2023
For Broker Dealer /
RIA /
Financial Professional
use only.

(262) 626-2590 www.RealWealthMarketing.com Info@RealWealthMarketing.com

@RealWealthMktg

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ia-ld-a-71-2-2023

Next up... **David Buckwald**



- Founding partner at Atlas Advisory Group, LLC
- Specialties include life insurance strategies, estate planning, and wealth transfer issues
- Featured speaker at industry conferences and training seminars around the world

Don't forget to register for these sessions ***every month!***
2nd Friday @ 10:30am CST



Friday, March 10th
10:30am CT

Announcing an extra special guest in April...



David Walker



- Former US Comptroller General
- Senior Strategic Advisor, PwC
- Served as 7th U.S. Comptroller General ('98 – '08)
- Former CEO of the Comeback America Initiative
- Earned three presidential appointments, each by different Presidents
- Has over 40 years of public, private & nonprofit sector experience
- Back for the first time since 8/12/16

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2nd Friday @ 10:30am CST



BACK OFFICE TAX SERVICES

- Back office tax service for financial professionals
- Letter of recommendation from a CPA + option for additional consulting
- Tax planning, not just tax preparation!

Scan here
to learn
more!



RWTax.net/back-office



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Scaling Virtually

Overview

1. Who is Caleb

2. Value Leverage Framework

3. 5 Steps to Scaling Virtually





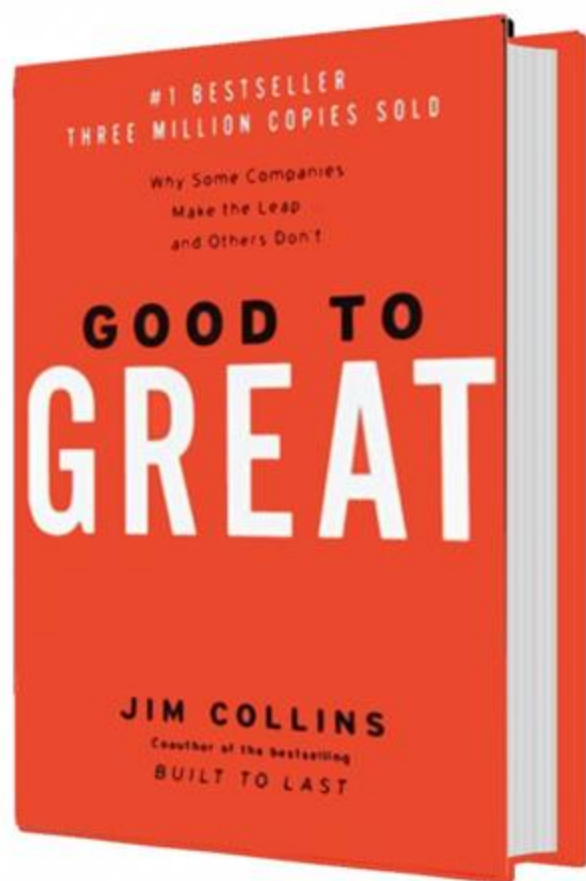
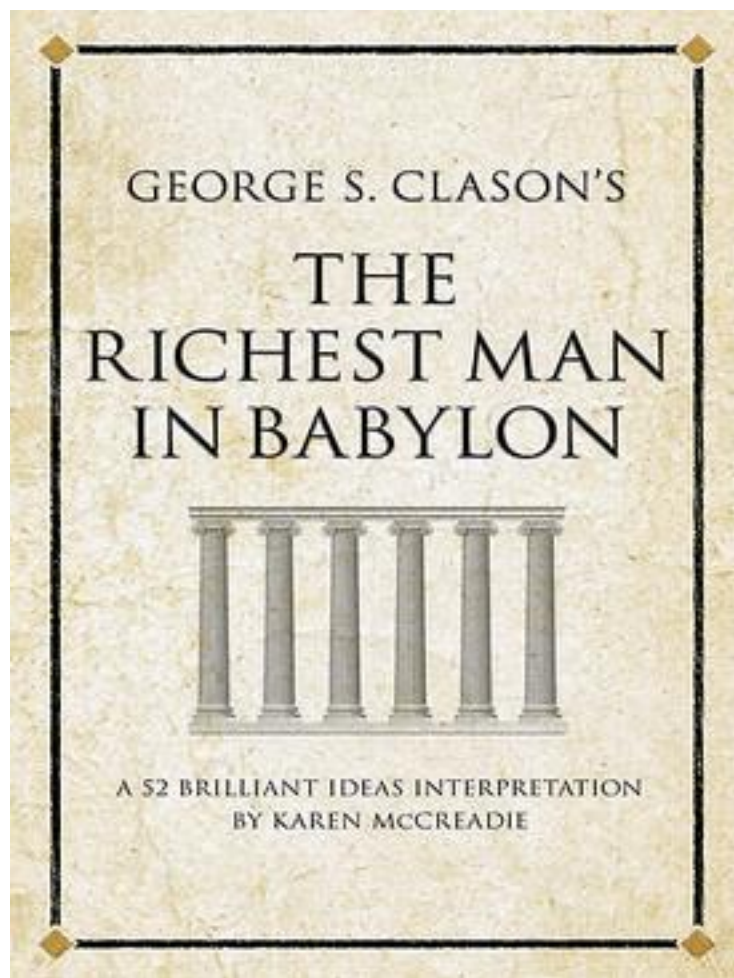
”

“The things you can't control don't worry about... But the things that you can control go all in...”

-mom

Starting my
JOURNEY







I was only
19 YEARS OLD...









BETTER WEALTH
PODCAST

THE AND ASSET

Caleb Guilliams



The Secret Way to Save and Use Your Money at the Same Time



BETTERWEALTH



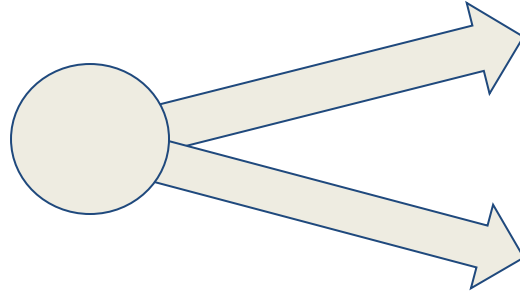
Value Leveraging™



1. Create Value

2. Maximize That Value

Value



Service

Product

Value = Output

***Perception of The Output**

“The thing we call **profit** should just mean over time that the **value of the output is worth more than the inputs.**”



-Elon Musk

LEV-ER-AGE

Use to maximum advantage

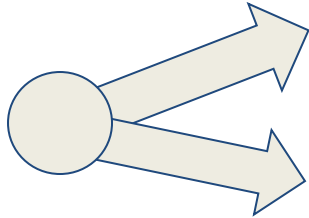
Disclaimer

Leverage without **is**

a DISASTER

Value Leverage Equation

Input



Output

Service



Product



Leverage

SERVICE

PRODUCT

6 Leverage Areas

1. Labor - People



2. Capital - OPM



3. Media - Language

THE **AND** ASSET
Caleb Guilliams



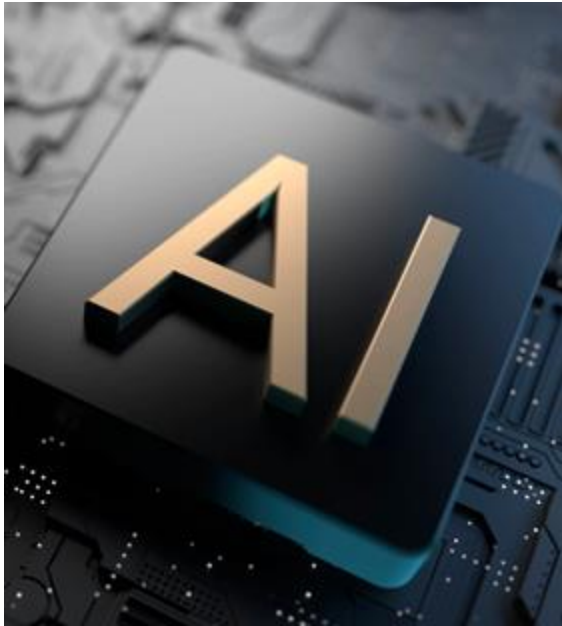
The Secret Way to Save and Use Your
Money at the Same Time



4. Platform - Stages



5. Code



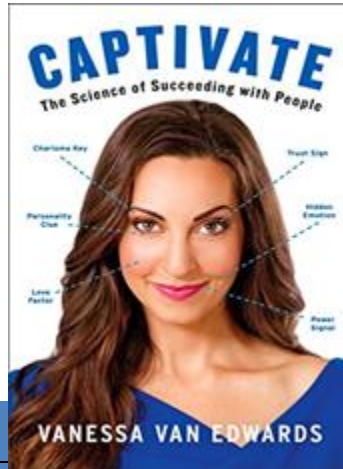
6. Influence - Charisma



Warmth

EQ
Likable
Empathy
Smiling

Charismatic



Competence

IQ
Knowledge
Efficient
Productive
Knowledge

5 Steps to Scaling Virtually

1. Offer
2. Irresistible Gift
3. Sales
4. Automation
5. Marketing

1

Offer

(Proprietary Process)

Who & How

Value Exercise

1. Who's your ideal client?

Value Exercise

1. Who's your ideal client?

2. What problem do they have?

Value Exercise

1. Who's your ideal client?

2. What problem do they have?

3. How do you **crazy over-deliver** to solve that problem?

Proprietary Process

- ❑ What results or outcomes come from your proprietary process?
- ❑ Brand it and make it your own!



5 Protection
(Risk Management)



Clarity
(Return on Result™)

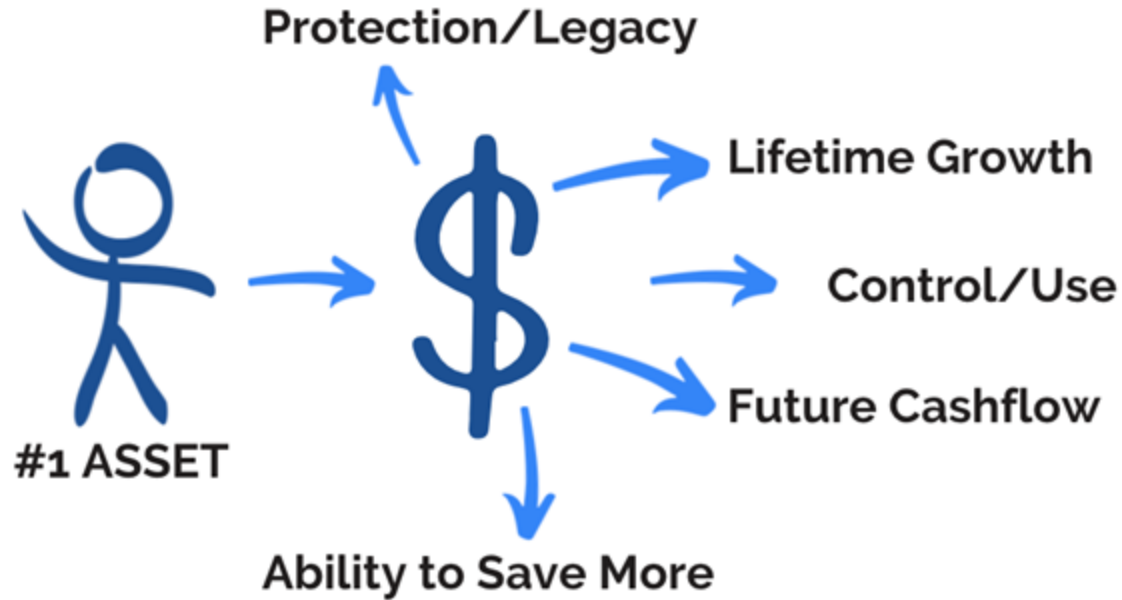


Cash Flow Ratio™
Money only does 2 things

4 Maximize Results™
You Cash Flow
Assets Business

3 Optimize Inefficiencies™
Taxes Debt
Spending Credit

Give Your \$ More Than 1 Job



2

Irresistible Gift

**(Value Add Free Offer No
Strings Attached)**

Gift





Ideal Client





Examples


- ❑ Checklist
- ❑ White papers
- ❑ E-Books
- ❑ Video
- ❑ Podcast
- ❑ Documentary
- ❑ Webinar
- ❑ Calculators

LEARN MORE

First name...  

Last name... 

Email address... 

Phone number... 

I agree with the Terms and Conditions

[CLICK HERE TO LEARN MORE](#)

3

Sales

(Efficiency)

Sale Tactics



Sale Tactics



ef·fi·cien·cy

“the ability to **avoid wasting** materials, energy, efforts, money, and time in producing a **desired result.**”

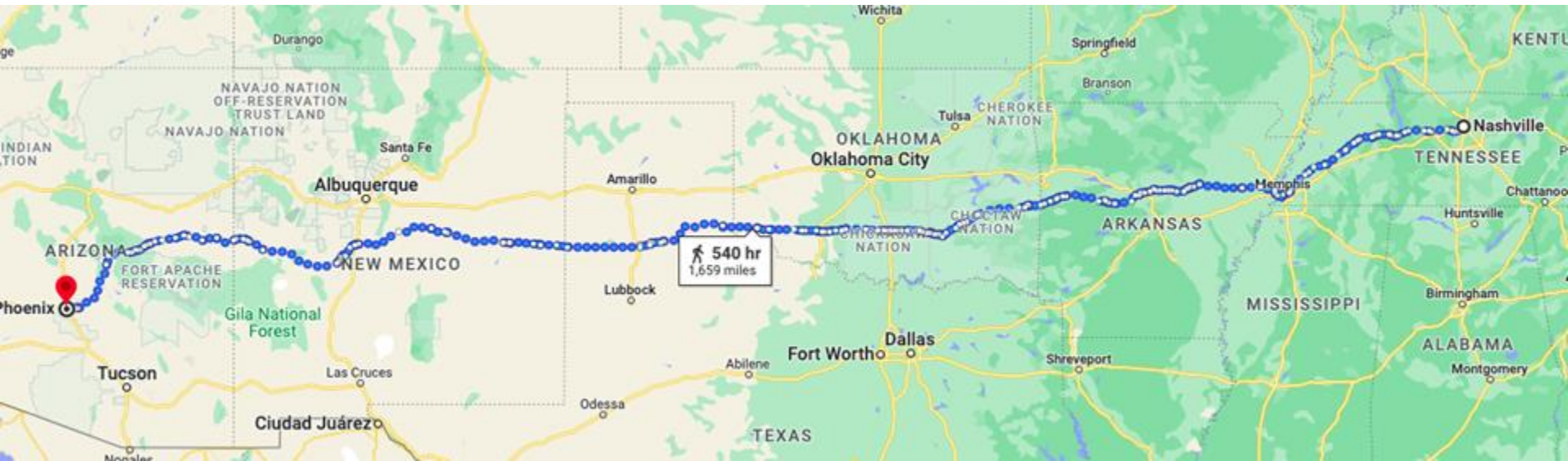
1) DESIRED RESULT



2) Eliminate Friction

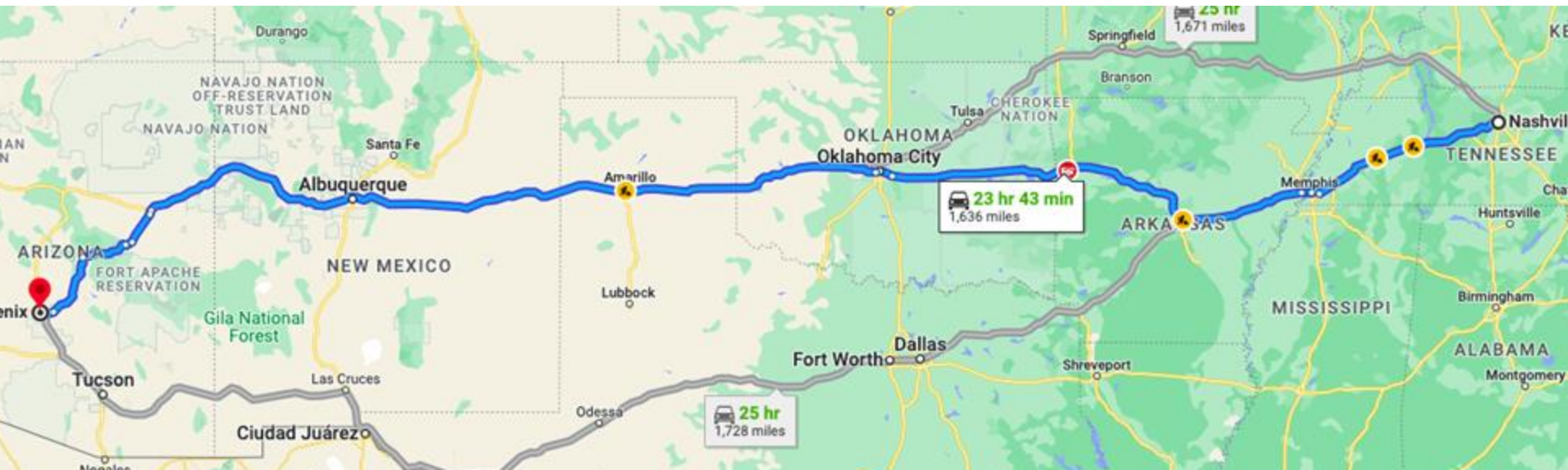
20

(12 hr. days)

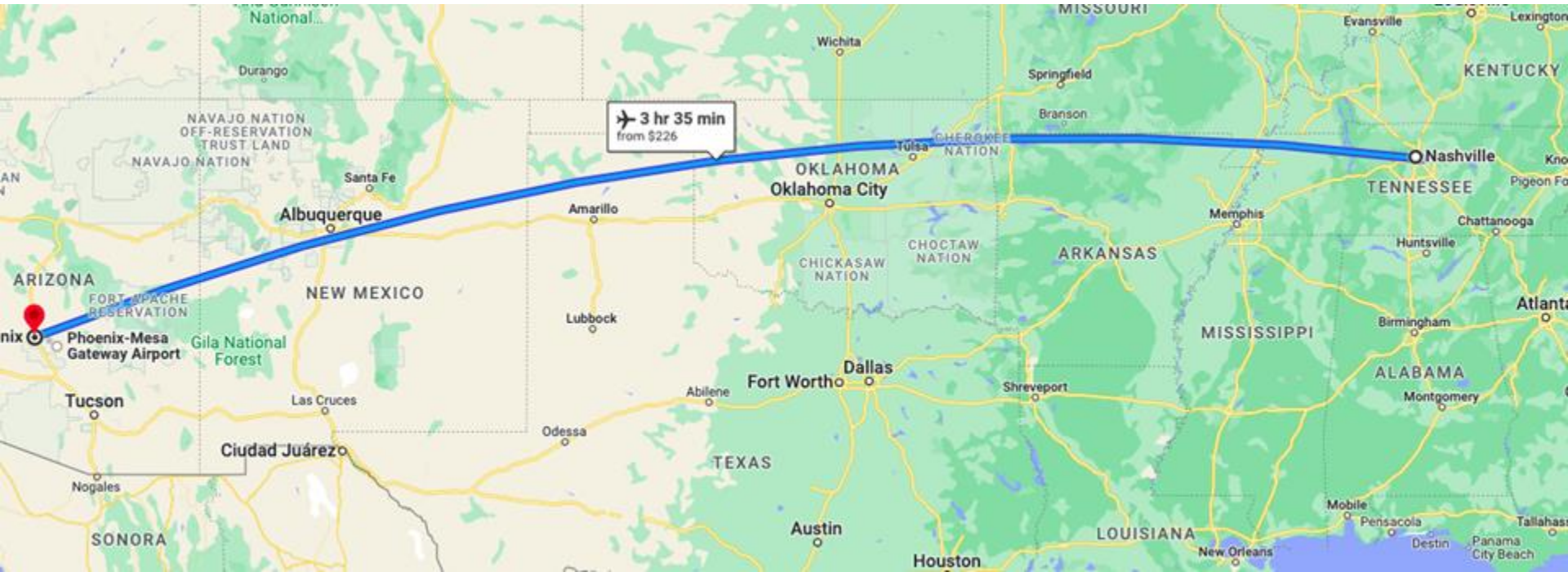


2

(12 hr. Days)



4 Hours



Examples of Wealth Friction

- Lacking Clarity
- Overpaying on Taxes
- Underperforming Investments
- Bad Debt
- Overspending
- Insurance Gaps
- Not knowing your numbers.
- Lack of Control
- Anything that leads to an unintentional life...

4

Automation

(Technology)



5 Main Tech Components Needed

- ❑ Website - Offer is clear and CTA is present
- ❑ Funnels- Virtual sales process





Term Life Insurance

CALEB GULLIAMS

And Asset University

My goal is to help you see the power of what I write about in The AND Asset so you can start showing up more powerfully in your life and understand the secret of being able to save and spend your money at the same time.
- Caleb Guilliams

▶ Resume



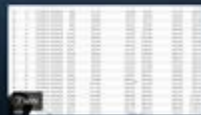
(1) And Asset Crash Course Intro



(2) Overview



(3) Overfunding



(4) Building a Max Funded Whole Life Policy

The And Asset®

15 Minute Masterclass

How To Give Your Dollars More Than ONE Job



SEE YOUR NUMBERS

LEARN MORE

First name...

Last name...

Email address...

Phone number...

STRATEGY SESSION

Meet With A Specialist

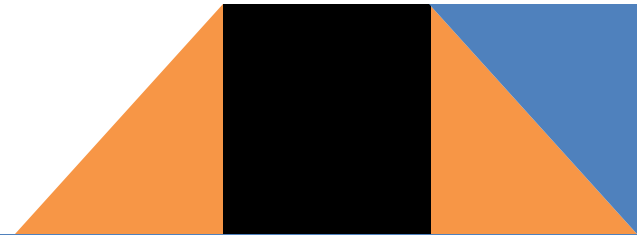
5 Main Tech Components Needed

- ❑ Website - Offer is clear and CTA is present
- ❑ Funnels- Virtual sales process
- ❑ Calendars - Ability for someone to book a meeting with you without having to go back and forth.



5 Main Tech Components Needed

- ❑ Website - Offer is clear and CTA is present
- ❑ Funnels- Virtual sales process
- ❑ Calendars - Ability for someone to book a meeting with you without having to go back and forth.
- ❑ Workflows - Internal and external communication

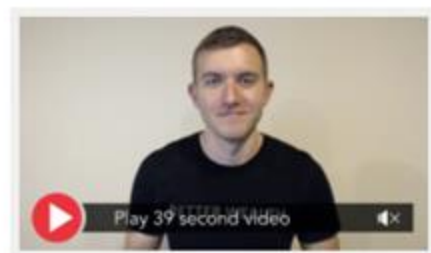
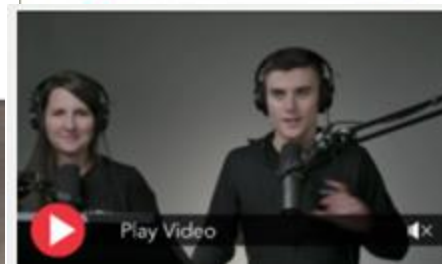
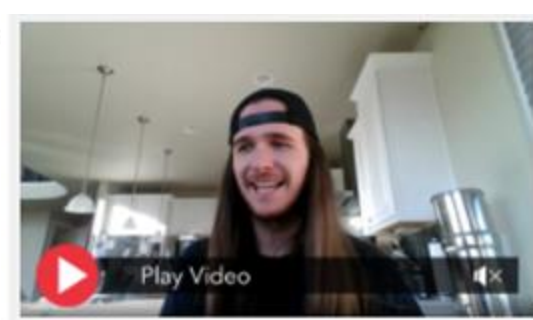
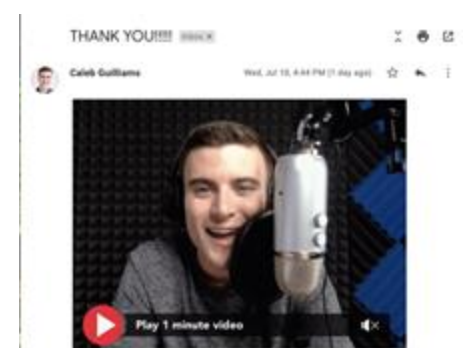


Video Emails

TOTAL VIDEOS

4,334

?

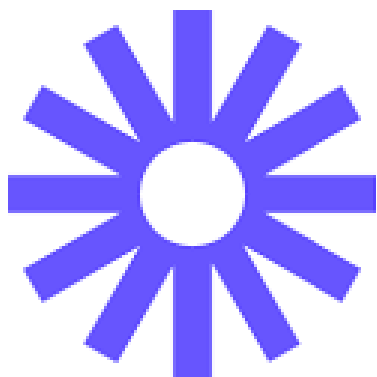




sendspark




BombBomb™



loom

5 Main Tech Components Needed

- ❑ Website - Offer is clear and CTA is present
 - ❑ Funnels- Virtual sales process
 - ❑ Calendars - Ability for someone to book a meeting with you without having to go back and forth.
 - ❑ Workflows - Internal and external communication
 - ❑ Virtual meetings - Meet virtually with people
- 

Virtual Whiteboard Hack



zoom



5

Marketing

(Get in front of your ideal
clients 😊)

Marketing

Offer / Gift



Attention



Ideal Client



3 Marketing Questions

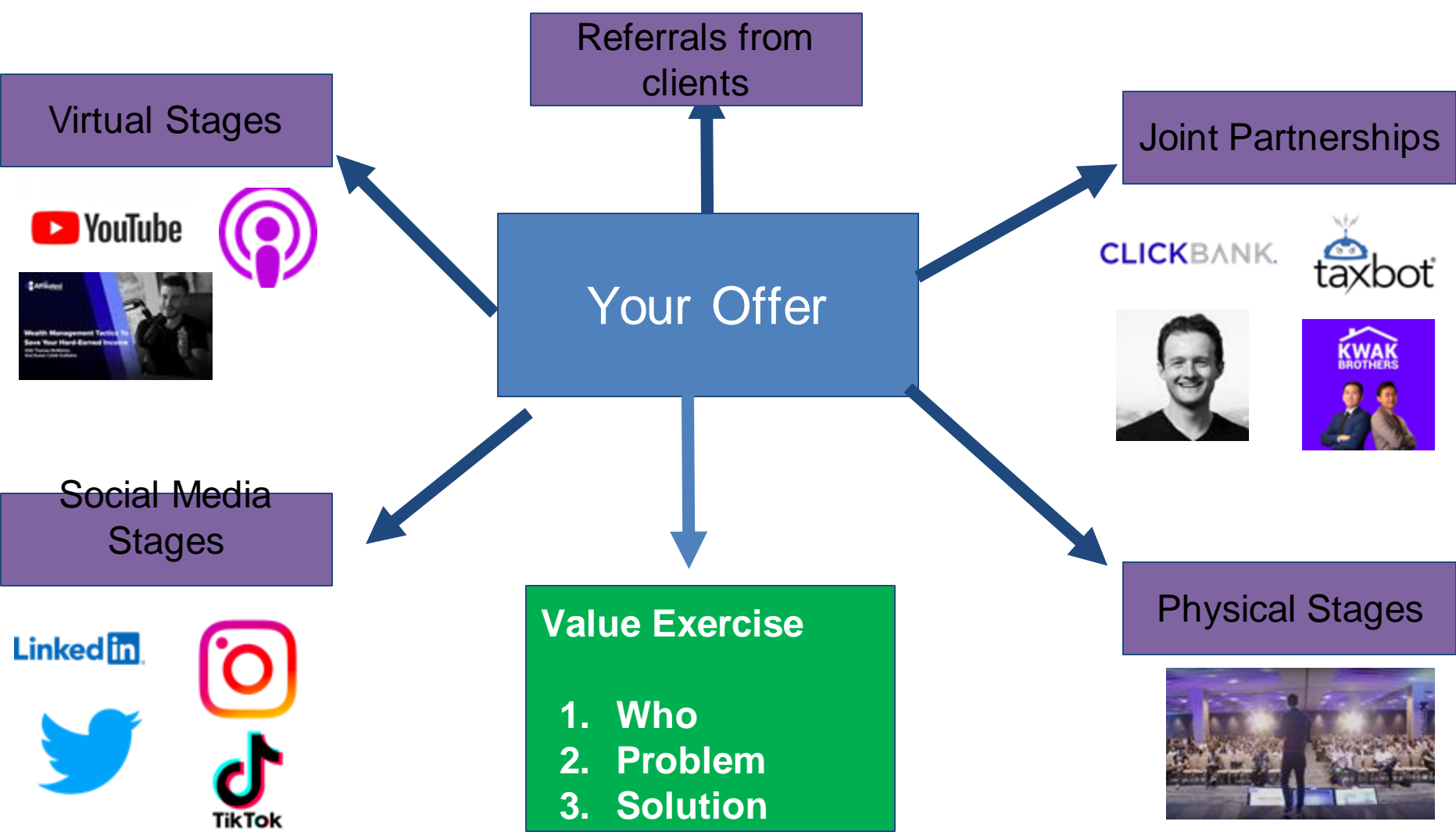
- ❑ Where are my ideal clients at?
- ❑ How can I add value to them today?
- ❑ What's the best way to get their attention and transfer that value?

Your Offer

```
graph TD; A[Your Offer] --> B[Value Exercise];
```

Value Exercise

1. Who
2. Problem
3. Solution



- ❑ My Presentation Slides
- ❑ Value Leveraging Checklist
- ❑ Virtual Studio PDF
- ❑ Virtual White board video
- ❑ Social Media Breakdown
- ❑ Chrome Extension
- ❑ Elon Musk Video
- ❑ Social Media Guide



Virtual Audit

- Clear Offer (Right Away)
- Obvious Call to Action
- Free Lead Magnet
- Easy Navigation
- Relatable Images





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COACHING



MASTERCLASSES



ADVISOR

ELEVATED

5-STEP ELEVATED PROCESS



Thank You

Virtual Audit



ValueLeverageing.com/realwealt

[h](mailto:Caleb@BetterWealth.com)

Caleb@BetterWealth.com



Thank You



Caleb@BetterWealth.com

@calebguilliams



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- Letter of recommendation from a CPA + option for additional consulting
- Tax planning, not just tax preparation!

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TESTIMONIALS



ROB WINTERS



Honest, relaxed advice and NOT marketing and selling approach. Keep up the good work and guest webinar speakers.



LEE BOWMAN



These sessions are awesome, keep 'em coming!



STEVE KASTRUL



*Keep up the great work! Thank you for providing this. Our industry needs it!
Thank you*



DAVID OSMOND



I highly value the thoughtful response to questions. Thanks for the good information!

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QUESTION & ANSWER

TYPE IN YOUR QUESTIONS

Don't forget to register
for these *every month!*
Second Friday @ 10:30 am



PSL
Power Session LIVE

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