



CAPITA
FINANCIAL NETWORK

2026 Advisor Marketing Plan

Power of 10

COI #1

Name:	Phone:
Email:	Current Relationship (KLTR) Status:

KLTR Goal for 2026

Know You <input type="radio"/>	Like You <input type="radio"/>	Trust You <input type="radio"/>	Referrals Active <input type="radio"/>
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What will you do to provide meaningful, consistent touch points? Be specific.
(For example: market updates, client education materials, co-branded content, intros to your own network, appreciation gestures, etc.)

Frequency of Contact (Monthly, quarterly, etc.) Be specific with your action plan.

Type of Communication (Call, text, or in-person) Be specific.

Power of 10

COI #2

Name:	Phone:
Email:	Current Relationship (KLTR) Status:

KLTR Goal for 2026

Know You <input type="radio"/>	Like You <input type="radio"/>	Trust You <input type="radio"/>	Referrals Active <input type="radio"/>
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What will you do to provide meaningful, consistent touch points? Be specific.
(For example: market updates, client education materials, co-branded content, intros to your own network, appreciation gestures, etc.)

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Type of Communication (Call, text, or in-person) Be specific.

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COI #3

Name:	Phone:
Email:	Current Relationship (KLTR) Status:

KLTR Goal for 2026

Know You <input type="radio"/>	Like You <input type="radio"/>	Trust You <input type="radio"/>	Referrals Active <input type="radio"/>
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What will you do to provide meaningful, consistent touch points? Be specific.
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COI #4

Name:	Phone:
Email:	Current Relationship (KLTR) Status:

KLTR Goal for 2026

Know You <input type="radio"/>	Like You <input type="radio"/>	Trust You <input type="radio"/>	Referrals Active <input type="radio"/>
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What will you do to provide meaningful, consistent touch points? Be specific.
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Power of 10

COI #5

Name:	Phone:
Email:	Current Relationship (KLTR) Status:

KLTR Goal for 2026

Know You <input type="radio"/>	Like You <input type="radio"/>	Trust You <input type="radio"/>	Referrals Active <input type="radio"/>
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What will you do to provide meaningful, consistent touch points? Be specific.
(For example: market updates, client education materials, co-branded content, intros to your own network, appreciation gestures, etc.)

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Type of Communication (Call, text, or in-person) Be specific.

Power of 10

COI #6

Name:	Phone:
Email:	Current Relationship (KLTR) Status:

KLTR Goal for 2026

Know You <input type="radio"/>	Like You <input type="radio"/>	Trust You <input type="radio"/>	Referrals Active <input type="radio"/>
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What will you do to provide meaningful, consistent touch points? Be specific.
(For example: market updates, client education materials, co-branded content, intros to your own network, appreciation gestures, etc.)

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Type of Communication (Call, text, or in-person) Be specific.

Power of 10

COI #7

Name:	Phone:
Email:	Current Relationship (KLTR) Status:

KLTR Goal for 2026

Know You <input type="radio"/>	Like You <input type="radio"/>	Trust You <input type="radio"/>	Referrals Active <input type="radio"/>
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What will you do to provide meaningful, consistent touch points? Be specific.
(For example: market updates, client education materials, co-branded content, intros to your own network, appreciation gestures, etc.)

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Power of 10

COI #8

Name:	Phone:
Email:	Current Relationship (KLTR) Status:

KLTR Goal for 2026

Know You <input type="radio"/>	Like You <input type="radio"/>	Trust You <input type="radio"/>	Referrals Active <input type="radio"/>
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What will you do to provide meaningful, consistent touch points? Be specific.
(For example: market updates, client education materials, co-branded content, intros to your own network, appreciation gestures, etc.)

Frequency of Contact (Monthly, quarterly, etc.) Be specific with your action plan.

Type of Communication (Call, text, or in-person) Be specific.

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COI #9

Name:	Phone:
Email:	Current Relationship (KLTR) Status:

KLTR Goal for 2026

Know You <input type="radio"/>	Like You <input type="radio"/>	Trust You <input type="radio"/>	Referrals Active <input type="radio"/>
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What will you do to provide meaningful, consistent touch points? Be specific.
(For example: market updates, client education materials, co-branded content, intros to your own network, appreciation gestures, etc.)

Frequency of Contact (Monthly, quarterly, etc.) Be specific with your action plan.

Type of Communication (Call, text, or in-person) Be specific.

Power of 10

COI #10

Name:

Phone:

Email:

Current Relationship (KLTR) Status:

KLTR Goal for 2026

Know You



Like You



Trust You



Referrals Active



**What will you do to provide meaningful, consistent touch points? Be specific.
(For example: market updates, client education materials, co-branded content, intros to your own network, appreciation gestures, etc.)**

Frequency of Contact (Monthly, quarterly, etc.) Be specific with your action plan.

Type of Communication (Call, text, or in-person) Be specific.

KLTR: The 10-Relationship Deepening Strategy

Know You → Like You → Trust You → Refer to You

Each advisor selects 10 people (clients, prospects, peers, partners, or internal stakeholders) to intentionally deepen relationships over the year using KLTR.

The goal: build strong, human relationships that naturally lead to advocacy, collaboration, and referrals.

★ K - KNOW YOU

Help people understand who you are as a person and a professional.

- Share your “why” – what motivates your work and how you define success.
 - Clarify how you work best and how others can work best with you.
 - Share your background and experiences that shaped your perspective.
 - Ask a personal question and share your answer too.
 - Give a behind-the-scenes look at how you prepare, prioritize, and follow through.
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★ L - LIKE YOU

Build warmth, familiarity, and genuine connection.

- Show interest in their world – roles, goals, pressures, and wins.
 - Recognize milestones, achievements, or personal moments.
 - Follow up on something they mentioned previously.
 - Share relevant articles, insights, or resources tailored to them.
 - Be present, responsive, and human - not transactional.
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★ T - TRUST YOU

Demonstrate reliability, competence, and consistency.

- Do what you say you will do – every time.
 - Communicate clearly and simply, especially when things are complex.
 - Be proactive rather than reactive.
 - Be honest when you don’t know or when something isn’t the best fit.
 - Create clarity by summarizing next steps and expectations.
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★ R - REFER TO YOU

Earn advocacy and introductions naturally.

- Be clear about how you help and who you help best.
 - Make it easy for others to explain what you do.
 - Invite collaboration and inclusion (“happy to help anyone who needs it”)
 - Share outcomes and progress stories (without names).
 - Consistently show up in a way that makes people confident recommending you.
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HOW TO USE KLTR

- Select 10 intentional relationships
- Choose 2-3 actions per KLTR over the year
- Track touches and follow-through
- Focus on depth, not volume.

Other Initiatives

Please use this page to keep track of any other initiatives you are using to broaden your network (YouTube channels, presentations, events, etc.)

Name of Initiative:

Explanation (If you list multiple items here, please include individual costs for each):

Estimated Total Cost:

Name of Initiative:

Explanation (If you list multiple items here, please include individual costs for each):

Estimated Total Cost:

Name of Initiative:

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