Building brand & reputation

The secret sauce for financial planners

rozannarashid.com

About Me

السَّلَامُ عَلَيْكُمْ

Rozanna Rashid

- Economics degree background
- Corporate banker as first job
- Now an entrepreneur...
- ... and also licensed financial planner
- CFP & IFP charter holder
- Mom, wife & catmom

CONTENT

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Super ingredients

Tell a Powerful Origin Story

- Top planners share a compelling personal journey: why they chose financial planning, what drives them, and what they believe.
- Storytelling makes the brand *human* and memorable.

motivation

Educate, don’t sell

01

02

Niche Down to Stand Out

Show Proof & Social Credibility

03

04

Build a Personal Brand, Not Just a Business Brand

Secret sauces

Be client centric

05

06

Stay visible & consistent

Invest in professional branding

07

08

Get featured (media)

Secret sauces

Educate, Don't Sell

Build authority by giving away massive value through content: blogs, videos, newsletters, webinars, etc.

Goal is to *solve before you sell*—building trust by being helpful.

Niche Down to Stand Out

Do not try to serve *everyone*.
pick a niche—like doctors, tech employees, or business owners—and speak directly to their problems.

Positioning as experts in that niche builds faster trust and referrals.

Show Proof & Social Credibility

Client success stories, testimonials, reviews, awards, media appearances, podcast guest spots—these serve as third-party validation.

Make it easy for others to see you're the real deal.

Build a Personal Brand, Not Just a Business Brand

People follow *people*. Top planners use LinkedIn, Twitter, YouTube, and Instagram to share not just insights, but values, personality, and even lifestyle.

They show up consistently as *thought leaders*.

Be Obsessively Client-Centric

Exceptional service becomes a brand in itself—surprise touches, fast communication, and proactive advice.

Happy clients are the best brand ambassadors and referral sources.

Stay Visible & Consistent

Reputation is built through consistency. They stay active in content creation, follow-ups, check-ins, and events.

Even if their audience isn't ready to buy, they're always top-of-mind.

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Invest in Professional Branding

High-quality website, good photography, clear messaging. They treat their brand like a high-end product.

First impressions *matter*—especially in finance.

Get Featured - Media, Awards, Events

Actively pursue speaking engagements, articles in financial media, or industry awards.

Public recognition fast-tracks reputation and credibility.

take away lessons

Proper credentials

Live your values

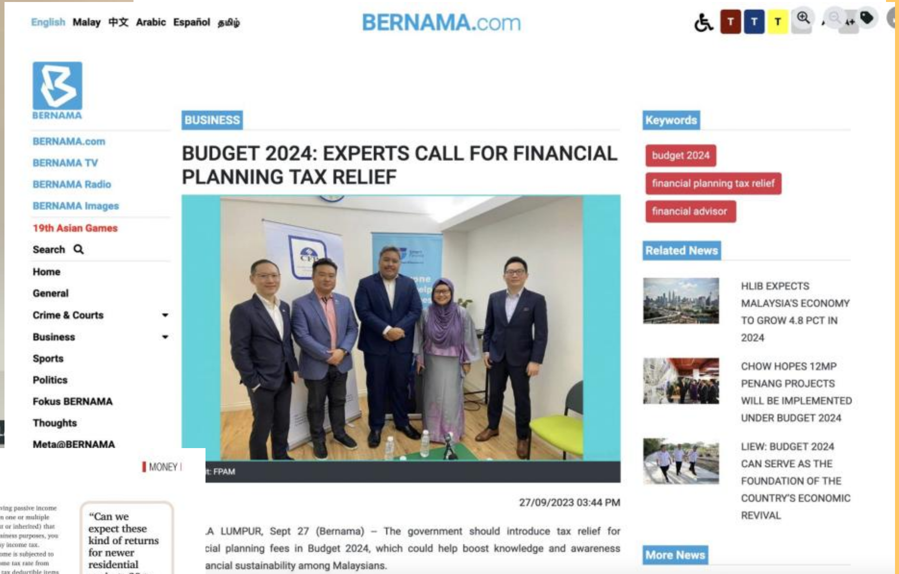
Be Authentic

Network = Networth

Consistency

DO NOT try to be someone
you are not.
Lead with integrity, honesty,
and long-term thinking.
Authenticity creates trust—
and in finance,
trust is everything.

Media appearances



Monday, November 13, 2023 • The Malaysian Reserve

CORPORATE/NEWS

Pension system needs upgrading as nation heads towards 'super-aged society'

Malaysia lacks structured decumulation programmes, potentially leading to inadequate financial support for retirees

by AUFA MARDHIAH

As of September 2023, 81% of EPF members below age 55 do not meet the basic savings requirements by age

EPF's Strategies to Enhance the Pension System

Elya Nabila says pension reform needs comprehensive research into policy development, execution and impact on stakeholders

Rozanna suggested several measures including transitioning govt and civil servants to the EPF and PRS schemes

Wong says insurance should not be seen as a traditional 'investment', but rather as a fundamental risk management tool

Immense Pressure on Pension System

MONEY

"Can we expect these kind of returns for newer residential projects 20 to 30 years down the road?"

Media appearances