

<Summarized research is below>

Email #1

SL: Still looking to become financially independent, Denise?

Hey Denise,

I'm writing this email to you because some time ago you downloaded the Financially Bulletproof checklist.

The checklist goes through 5 different stages you need to master to become financially bulletproof and **start creating the life of freedom and abundance you deserve**, remember?

As someone who's clearly serious about your finances, I'm sure what I'm going to tell you about is going to excite you.

If you're tired of having to answer to that nagging boss at your 9-5 (seriously, who hired that guy?), I am hosting a **free webinar** in which I'm going to show you how you can *start your journey towards financial independence* through building your six-figure investment portfolio.

Imagine a life where you don't have to wake up to an alarm clock every single morning. Where you don't have to waste your life away every day spending 45 minutes in traffic on your way to the office. Not having to spend another second in that toxic work environment...

You could be spending more quality time with your family, your friends. Being able to buy them dinner every so often. Treat yourself to a nice trip WITHOUT having to ask your boss for permission... You deserve that. Forget what your employer and the news are telling you.

Most people don't start their journey towards financial independence because they feel overwhelmed by the stock market. They don't know where to start and have no one to guide them. I'm here to tell you that you don't need to feel overwhelmed.

Join us on the live call and I'll show you step-by-step how to begin this adventure, and those feelings of insecurity, uncertainty and overwhelm will be a thing of the past.

As you're someone who's serious about managing their finances and wants to be truly independent, I'm sure you don't want to miss this. (Especially if you're looking to **put your hard-earned money to work for you this year.**)

Be prepared to learn the ins and outs of:

- **My Millionaire Investing method**, which I've used while working as a financial exec at Wall Street for 10+ years to *make millions for my clients* (I'm sure my last employer will hate me if they know I am sharing this information publicly...)
- **How to manage your money like the richest 1%** so you never have to worry about having enough saved up for a rainy day AND STILL have plenty of money to invest.

- **And why NOW may be the best time for you to start investing** in the market and use the looming recession to your absolute advantage.

And learning all of this will cost you just ONE HOUR of your time (joining us on the call will take up less time than watching *an episode of Love is Blind...*) Invest your time wisely and picking up calls from your boss at 9pm may finally be a thing of the past.

If this is not enough, at the end of the webinar I'll be hosting a live Q&A at which you can **ask me anything** related to finance and investing. (When was the last time you had the chance to *pick the brain of someone who has over 10+ years of experience at Wall Street?*)

Are you ready to start your journey towards financial independence, Denise?

See you there!

– Marc

P.S. Because I want to give everyone a fair shot at asking me all their questions regarding their finances and investing, the number of people who I can let into the training is capped at 50. Make sure you reserve your spot so you won't miss your chance...

P.P.S. If you sign up and won't be able to make it after all, no worries. I'll be sending a replay to everyone who registers with the link in this email. Make sure to be there if you want to get a glimpse of my **brand-new value-packed investing guide**, though...

We get the prospect's email address whenever someone downloads the checklist. Hence, the prospect knows he has a problem with money and knows he can solve this by investing. The prospect does not yet know about the education platform, hence the prospect is solution aware. We need to introduce the product and why the product is better than every other product solving this problem.

Awareness level: problem aware.

Sophistication level: the avatar knows that there are solutions out there but hasn't bought a course yet.

Target Market

- What kind of person is going to get the most out of this product?

Young 25-40 year olds who want to FI/RE. Financially independent and retiring early is their dream. Marc will be able to set them up so they are investing towards their dream life.

- Who are the best current customers, with the highest LTV?

Early 30s women who vibe with Marc. They want to be seen as strong independent women.

- What attributes do they have in common?

Avatar

- Name, age and face. This makes it much easier for you to imagine them as a real, individual person.

Lisa, 31 years old, no kids.

- Background and mini life history. You need to understand the general context of their life and previous experience.



Lisa grew up in a single-mom household. Due to her childhood, she has developed herself into a woman who is very independent. She went through college, majored in law, and is currently working as a law clerk. She's dating on and off, but does not have any serious relationship as of now. She wants to set herself up for a good life. Work hard now and retire early.

- Day-in-the-life. If you can get a rough idea of what the average day in their life looks like you will be able to relate more easily to them.

Wake up - prepare for work - breakfast - work - lunch with colleagues - work - maybe have some drinks after work with colleagues or meet up with friends to go to dinner - work out twice per week with friends - chill and watch some Netflix - go to bed.

- Values. What do they believe is most important? What do they despise?

Independence from anyone telling her what to do. Living her own life, on her terms. She has a very tight relationship with her mom and she wants to build a family. She's looking for the perfect guy, just to be sure he doesn't walk away like her dad did..

- Outside forces. What outside forces or people does the Avatar feel influences their life?

Nobody in Lisa's life has anyone ever taught her how to manage her money. Not the government, not the education system, no one. She has a feeling she has been wronged by them not telling her how to become financially independent.

Current State

- What is painful or frustrating in the current life of my avatar?
- What annoys them?
- What do they fear?
- What do they lie awake at night worrying about?
- How do other people perceive them?
- What lack of status do they feel?
- What words do THEY use to describe their pains and frustrations?

"But when I got injured in 2021 I really felt anxiety about my finances. I had an advisor but didn't truly understand where my money was going."

"Tired of feeling frustrated and like I was drowning I decided to research financial courses."

Dream State

- If they could wave a magic wand at their life and fix everything, what would their life look like?

Have a million dollars sitting in the stock market, passively creating income every month. Then they would be able to do what they enjoy in life and be truly financially independent.

- What enjoyable new experiences would they have?

Not worry about money ever again. Go on holiday whenever Lisa pleases, because she does not have to worry about her boss ever again. Waking up whenever she wants to wake up, because she doesn't necessarily have somewhere to be.

- How would others perceive them in a positive light?

Others would see that they've crafted their dream life, for which Lisa would gain respect from her peers. Be seen as strong and independent.

- How would they feel about themselves if they made that change?

They will finally be free from their job. Escape the rat race and live life on their terms.

- What words do THEY use to describe their dream outcome?

Roadblocks

- What is keeping them from living their dream state today?

Lisa doesn't really know where and how to start with investing her money. Also, she feels that she is too busy with work, and values time with her friends and family over everything. Hence, she does not make the time to learn the information she needs.

- What mistakes are they making that are keeping them from getting what they want in life?
- What part of the obstacle does the avatar not understand or know about?

“He made me realize the fees I was paying for some of my funds didn’t make sense because given their long-term underperformance.”

- What is the one key roadblock that once fixed will allow them to move forward toward their dream outcome?

A lack of information and guidance. Lisa has no clue what to do, and she would really like someone to tell her step-by-step what the plan of action is.

“I lacked the knowledge of the different investment accounts and made attempts to invest that resulted in no returns.”

Solution

- What does the avatar need to do to overcome the key roadblock?

Lisa needs the information in the shortest possible format. Additionally, Lisa needs to have someone there who she can ask everything about what to do exactly.

- “If they <insert solution>, then they will be able to <insert dream outcome>”

Product

- How does the product help the avatar implement the Solution?

The course will give Lisa all the information and tools she needs to start her journey as an investor. She gets instant access to Marc as well, which means she can ask every question possible.

- How does the product help the reader increase their chances of success?
- How does the product help the reader get the result faster?
- How does the product help the reader get the result with less effort or sacrifice?
- What makes the product fun?

- What does your target market like about related products?
- What does your target market hate about related products?

Notes about Marc - the business offering this product

“He has a unique gift for explaining concepts to the layperson in a way that doesn’t put you down but lifts you up.”

“Keeping me focused and determined”

“The finance mentor I never had”