



# **Building Your Professional Biography**

*How to get Great Referrals*

Kevin Berwald CLU<sup>®</sup>, ChFC<sup>®</sup>, CFP<sup>®</sup>, CASL<sup>®</sup>  
CMO, National Sales Manager



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# Benefits to Building and Having a **Great Professional Biography**

- Creating the seven elements makes you think differently about your business
- Empowers you to control and convey how you and your business is perceived
- Makes it easier to discuss your value proposition and quantify your value
- Helps you identify the key elements of the prospects and clients you want
- A great introduction tool for generating referrals to great clients
- Can be specialized for each of your target markets, ex: nurses or business owners



# *Why is it so Hard to Get Great Referrals?*

- We don't know the profile of your ideal prospects to ask for referrals to
- We don't know the identity of the referral sources to ask for referrals from
- We don't know the process of how to ask your referral sources for introductions
- Your referral sources don't know how to easily identify and make introductions to you

# The Seven Elements of *A Professional Biography*



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**Kevin Berwald, CFP®, CLU®, ChFC®, CASL®**

CMO, National Sales Manager

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*"It is literally true that you can succeed best and quickest by helping others to succeed."*  
– Napoleon Hill

Kevin Berwald began developing the skills and experience he shares with you over thirty five years ago when he, on a whim, took an interview with an insurance company for a wholesaling job. That interview has led to a career in both wholesale and retail sales, marketing, and leadership where Kevin has been a perennial top sales professional, Sales Manager, National Sales Manager and Consultant for some of the industry's greatest insurance and financial organizations and sales professionals. Kevin's training and coaching ethos, that he shares with you, is based on a personalization mindset that helps professional sales organizations, teams and individuals create and utilize Focused Sales and Intentional Client Acquisition Processes to reach new heights in capturing intentional market share. Kevin, along with the resources of Catalyst 4 Growth, offers insight, coaching and training from decades of success in personal sales, building sales organizations and helping others build and grow their own sales and marketing organizations, from a local to a national footprint.

Kevin, his wife, and two sons live in Grosse Ile, Michigan where they enjoy boating and fishing on Lake Erie, playing golf, hunting, raising honey bees on their farm and are members of Church of The Way. Kevin attended Olivet College where he received four varsity wrestling awards and was Co-Captain his senior year.

*Anchored by the core tenet that "the quickest road to success is helping others to succeed," Kevin and Catalyst4Growth best serves sales professionals and organizations that:*

- In Growth mode and are at a point where they need to develop or refresh their sales process, client acquisition processes, and/or marketing plan.
- Have plateaued or stalled out their market share and need to re-evaluate their sales and client acquisition processes to take back and grow market share.
- Have specific needs to address related to sales training, motivation, leadership, communication strategies, goal setting, recruiting, tracking, reporting, etc.

Many of our best client relationships have been related to:

- Sales Organizations with multi-levels of sales management
- Sales Professionals struggling with developing a marketing plan
- Wholesalers and Marketing distributors of financial and insurance products
- Independent Broker-Dealers and Banks
- RIAs and Financial Professionals seeking both business growth and life's balance

Contact myself or one of our associates today to schedule a no cost discussion to review your needs and possible next steps at 813-454-0557.

Visit our website [www.catalyst4growth.org](http://www.catalyst4growth.org) to explore our resources and services that are available to you.

Or accept our free gift to evaluate your current processes and identify where a catalyst might be utilized to help you reach new heights by completing our "C4G Evaluations & Top Catalyst Recommendation" tool. It can be found and downloaded on our website, [www.C4G.org](http://www.C4G.org). Contact Kevin or one of our associates today to schedule a discussion to review your results or discuss other needs and possible next steps.

Catalyst4growth.org  
813.454.0557



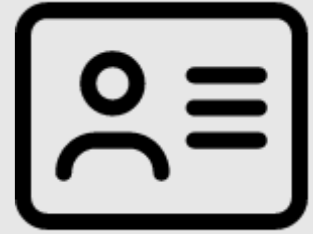
Professional Photo  
of yourself



Name, Title(s),  
Contact Information



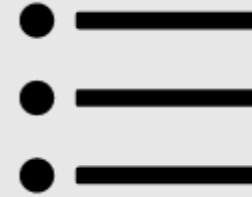
Personal  
Quote



Personal and  
Professional  
information about  
you



Your Value  
Propositions



Elements of your  
ideal client profiles



Call to action

7 ELEMENTS FOR BUILDING A BUSINESS PEOPLE TRUST



***Professional*** Photo of Yourself

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**Your** Name, Title(s) and Contact Information



"IT IS LITERALLY TRUE THAT YOU CAN

**Succeed**

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SUCCEED."

---

NAPOLEAN HILL

*Personal* Quote

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## ***Personal and Professional*** Information about YOU



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## Your **Value Propositions**

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## Elements of Your ***Ideal Client Profile***





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# *Call to Action*

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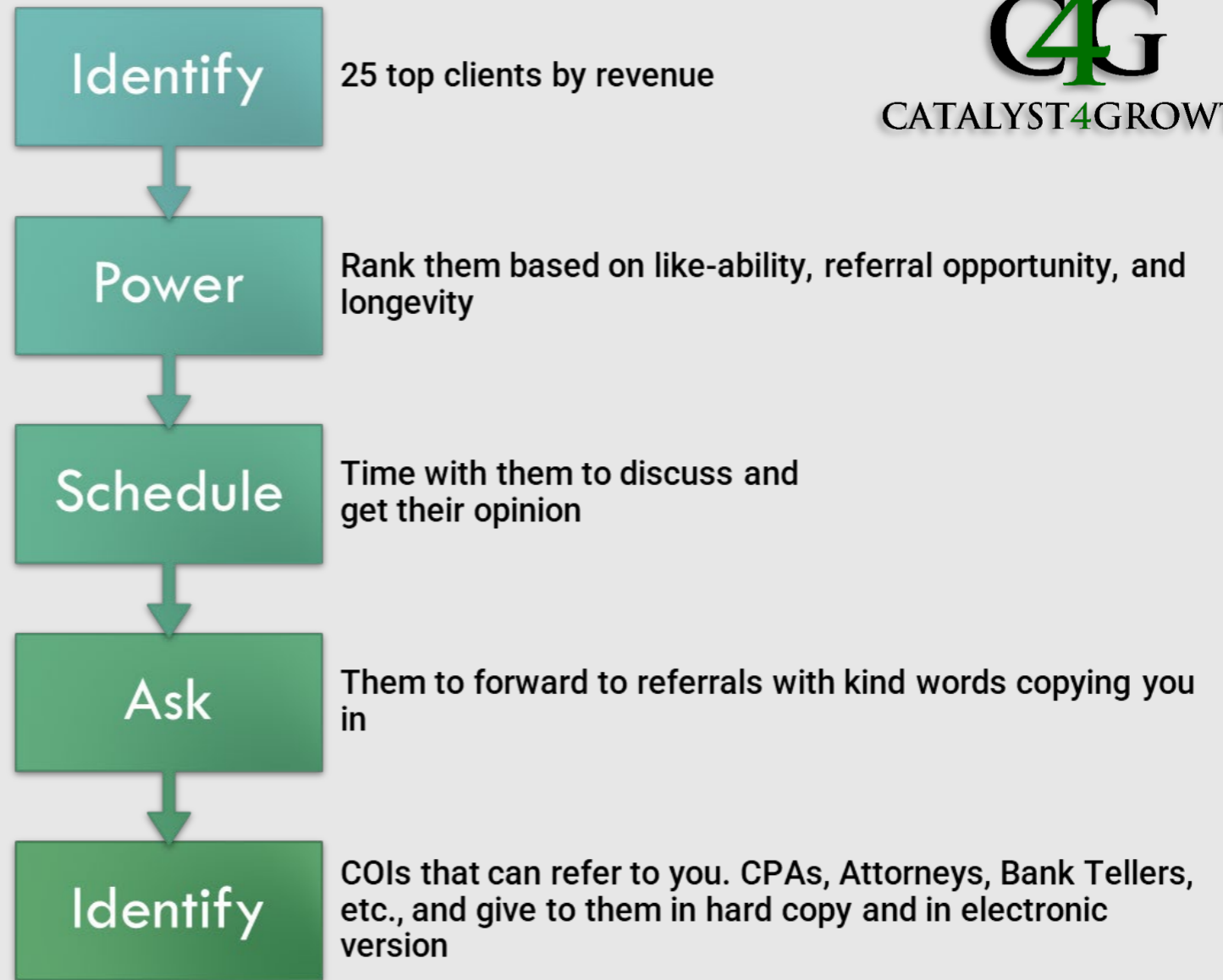
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# How to Use Your Professional Biography to *Get Great Referrals*





*Biography Generator*

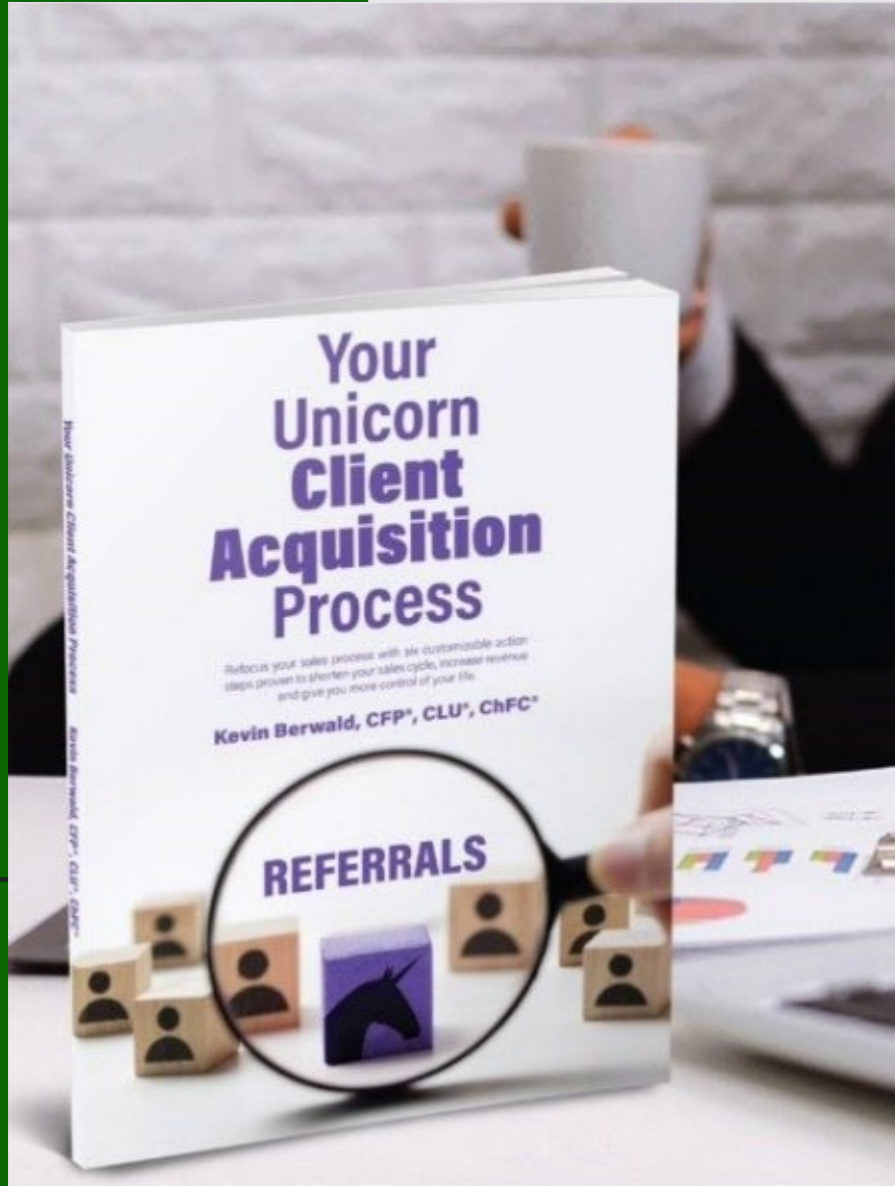


*Sample Biographies*



*Building a Professional  
Biography Presentation*

This process is repeatable and can be used to create separate bios for each of your target markets



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HOW TO BUILD A BETTER PROFESSIONAL BIOGRAPHY



**Questions?**

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HOW TO BUILD A BETTER PROFESSIONAL BIOGRAPHY