

BUILDING A £240K+ SALES PIPELINE IN 30 DAYS FOR A FOUNDER- DEPENDENT WEALTH FIRM

A system-led breakdown of qualification, compliance,
and scalable acquisition



 **Industry:**
Wealth Management

 **Timeframe:**
30 Days

 **Services:**
Paid Ads, Funnel Build, CRM, Automation

Executive Summary

The Purpose:

Let senior readers grasp **the value in 30 seconds**

Pre-qualify the leads to ensure that they are suitable for our client who sells a high-ticket service, at a high price point.

We want to put certain criteria and checks in place to disqualify tyre-kickers/ time wasters, and double down on those who are our ideal client.

With this type of client, we care about quality over quantity, as we understand the nuances of a founder-led financial service business.

MISSION

To remove founder-dependent lead generation and replace it with a scalable, compliant acquisition system that produces qualified demand without requiring the founder's time, reputation, or personal network.

THE CONSTRAINT:

Prior to the **MONTAJ METHOD™**:

All new business was generated directly by the founder

- Lead flow averaged ~5 enquiries per month
- The majority were unqualified, exploratory, or time-wasting
- Growth stalled whenever the founder was unavailable

TACTICS

Rather than increasing activity or adding disconnected tactics, the focus was to:

- Engineer trust before the first conversation
- Filter out poor-fit prospects automatically
- Position the firm as an authority without personal brand dependence
- Create a repeatable, trackable acquisition system

THIS WAS ACHIEVED BY COMBINING:

- Compliant paid media
- ICP-aligned positioning
- A high-performing VSL as the primary trust and qualification layer
- A structured landing and lead capture experience

All designed to function as a single integrated system, not isolated assets.

GOALS

Build an acquisition engine that:

Generates high-quality, pre-qualified enquiries

- Operates independently of the founder
- Remains compliant within a regulated financial services environment
- Continues to perform even when the founder is not actively involved

IN SHORT:

A system that works whether the founder is in the office or on the golf course.

METRICS

The Outcome (After) Post-implementation:

- Lead flow increased materially in both volume and quality
- Unqualified and time-wasting enquiries were largely eliminated
- The founder was removed as the primary acquisition bottleneck
- The firm generated £240,000 (\$320,000) in qualified pipeline in 42 days
- Performance was achieved using cold traffic, within regulatory constraints

MOST IMPORTANTLY:

Growth was no longer tied to the founder's availability.

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KEY PERFORMANCE INDICATORS



Cost per call:

£46.36



Pipeline value generated (qualified):

£240,000 / \$320,000



Conversion rate:

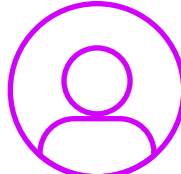
~13%

vs ~2% industry average



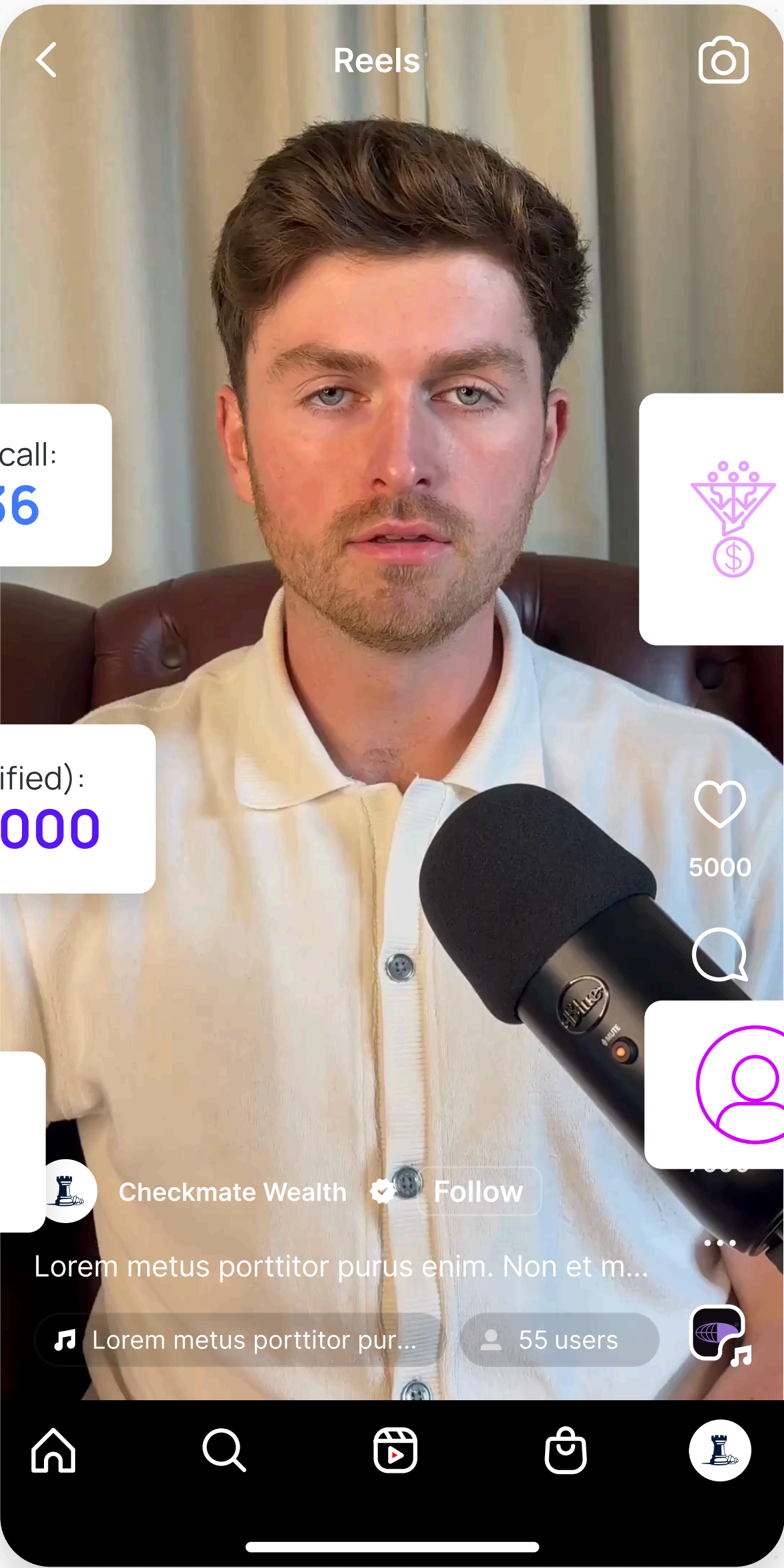
Lead quality:

Pre-qualified and pre-informed before conversation



Founder involvement required

Minimal



STEP 1:

Financially Compliant Paid Ads

Top of Funnel

The Purpose:

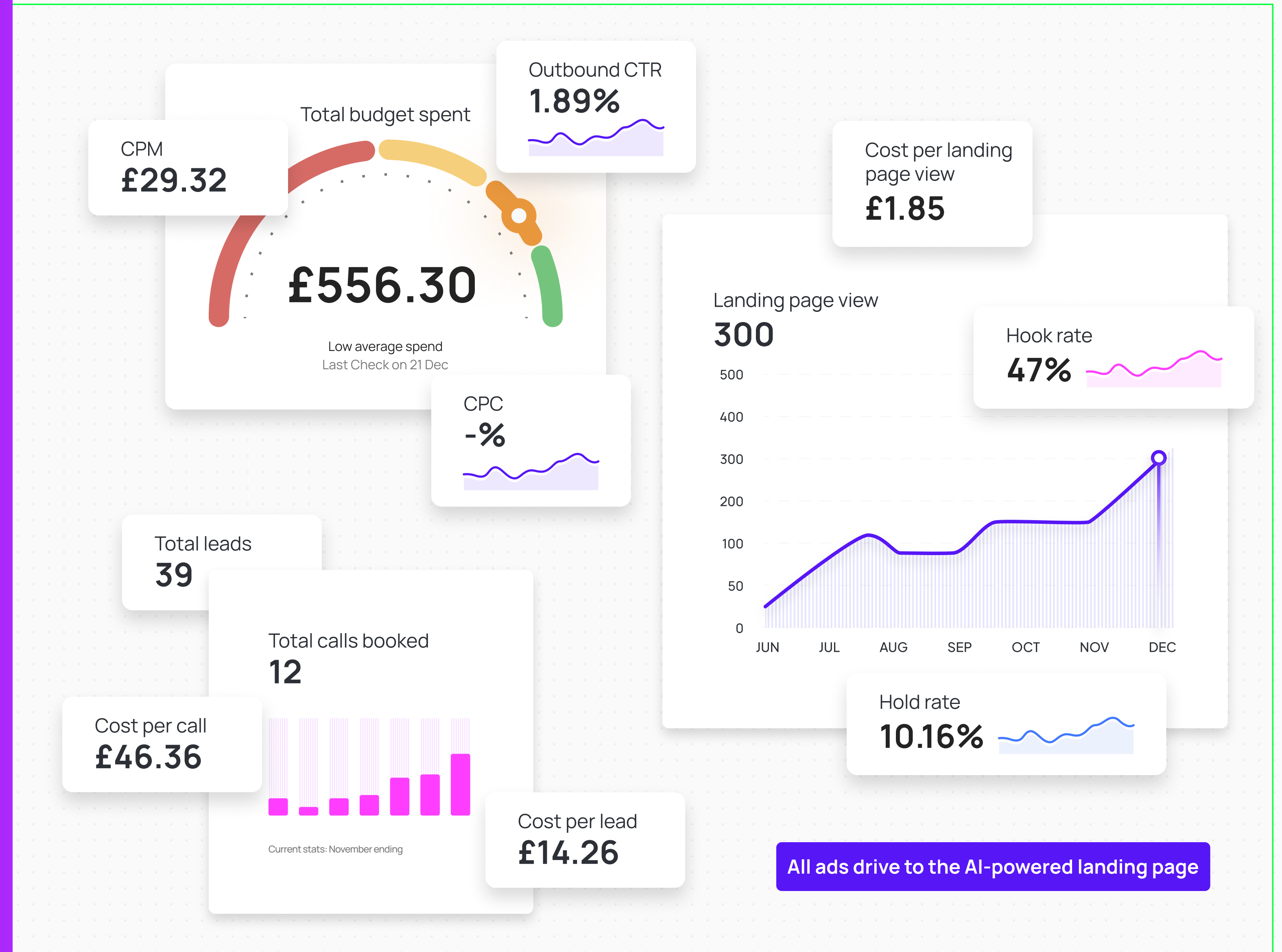
Generate cold traffic that is compliant and effective.

Key Constraints:

- Meta financial advertising restrictions
- No guarantees
- No misleading claims
- No outcome promises

Design Intent:

- Ads must “stop the scroll” while remaining compliant
- Clear hooks that speak to problems, not promises
- Authority-led, not hype-led



STEP 2:

AI–Powered Dynamic Landing Page

Primary Conversion Layer

The Purpose:

Convert cold traffic while simultaneously qualifying prospects.

Why this exists:

- Static forms convert poorly with cold traffic.
- A typical landing page converts at 2% from cold traffic, ours converts at 13%
- Dynamic inputs increase engagement and completion rates
- Qualification must happen before human contact, reducing no-show rates to calls

Key Functionality:

- Prospect inputs their own financial data
- Questions adapt dynamically
- System evaluates suitability in real time



SAFO Legal Architecture

Created by founders for UK families • £500k–£5m+ savings

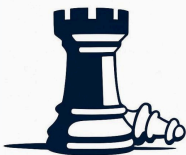
Get My Tax Report →

✓ HMRC-cleared

✓ Barrister-backed

✓ You keep control

✓ 2-min assessment



The Private Structure the Wealthy Use to Keep Control, Protect the Family, and Pass It All On — Legally.

Whether you own property, business, or farmland – or are building towards significant wealth.

For UK entrepreneurs moving towards profit and families protecting what they've created.

See Your Tax Saving Potential →

✓ HMRC-cleared structure

✓ Barrister-backed

✓ You stay in control

✓ Strategised with you

Legal Architecture for Families

What's Possible

Income Tax Savings

£500k to £5M+

Over 10-20 years

IHT Protection

Future liability eliminated

From Year 3 onwards

CGT on Business Exits

0% (when structured)

Via SSE planning

Full Control Retained ✓

Every strategy is bespoke and HMRC-approved for your situation. Created in partnership with Commercial Barristers and Legal tax advisors.

STEP 3:

VSL

Trust & Education Layer

The Purpose:

Warm cold prospects enough to continue the process. Aimed at people arriving from paid ads are extremely cold.

The VSL exists to:

- Explain the process
- Establish authority
- Set expectations
- Reduce scepticism

Placement:

- Embedded directly on the landing page
- Supports the dynamic lead capture, not replaces it

“

High-net worth Individuals (HNWIs) don't respond to "problem-solution" marketing. They respond to completion marketing.



They've already solved the problems most people face. As a firm who serves HNWIs, your role is to show them what's incomplete in their current structure and position yourself as the architect who completes it.

”

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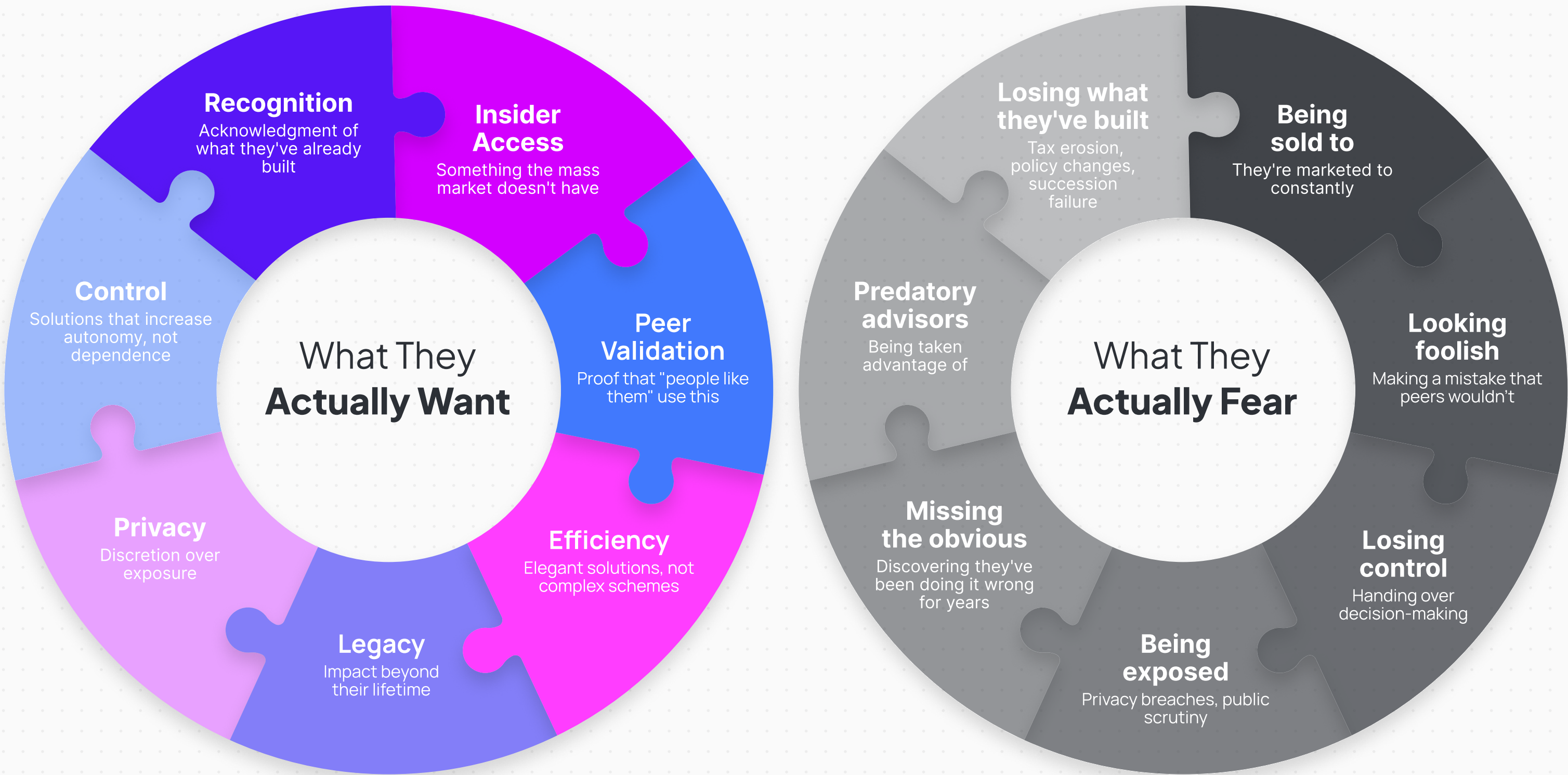
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THE HNWI PSYCHOLOGY MAP



STEP 4:

Dynamic Output & Free Insight Value Before Call

The Purpose:

Reward engagement and deepen qualification.

In This Case: A free calculator showing:

- 10-year trajectory
- 20-year trajectory

Comparison of:

- Traditional model
- Client's structured model



STEP 5:

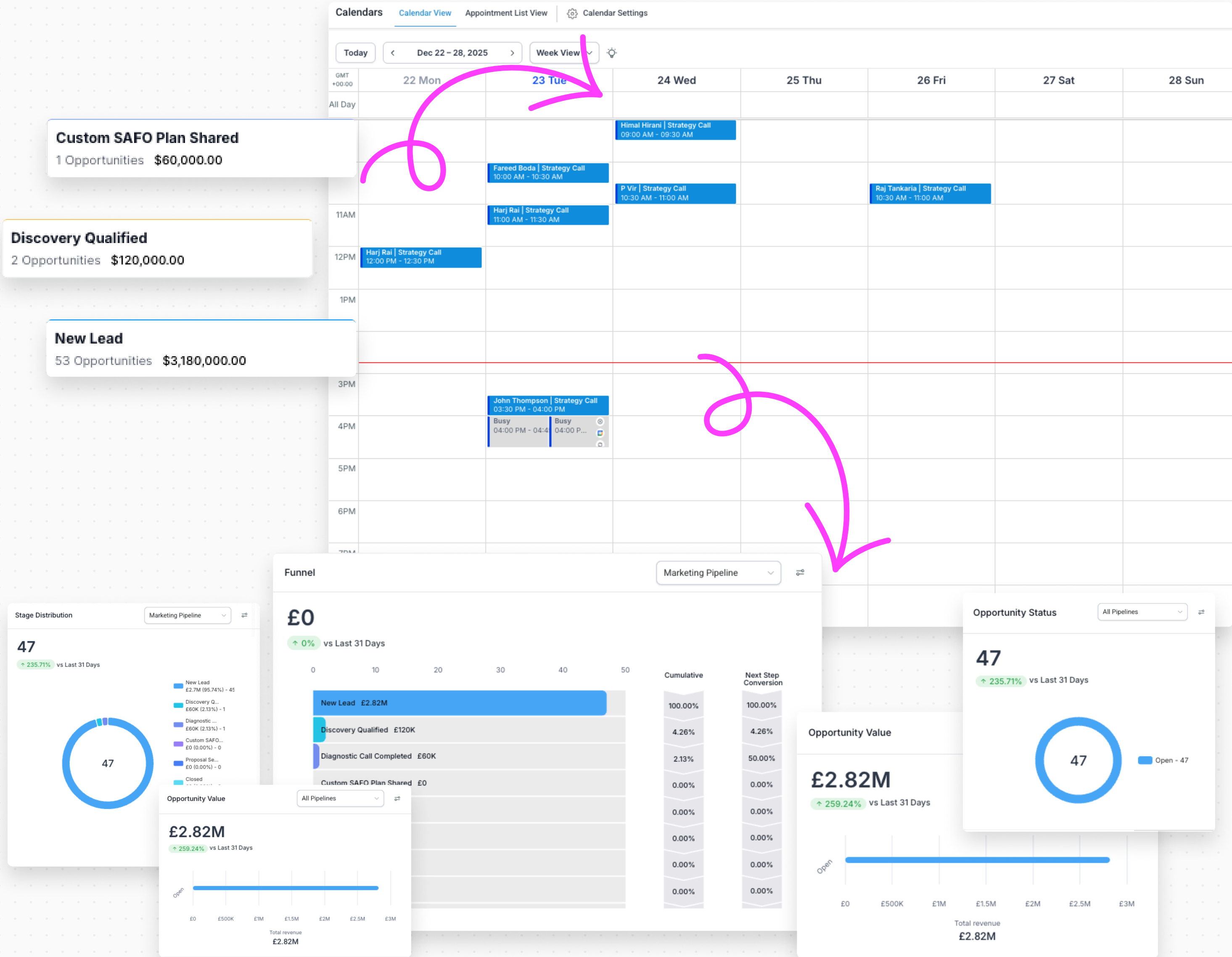
CRM Entry

The Purpose:

Store all prospect data centrally.

What's Captured:

- All form inputs
- Suitability indicators
- Engagement behaviour
- Calculator interactions



STEP 6:

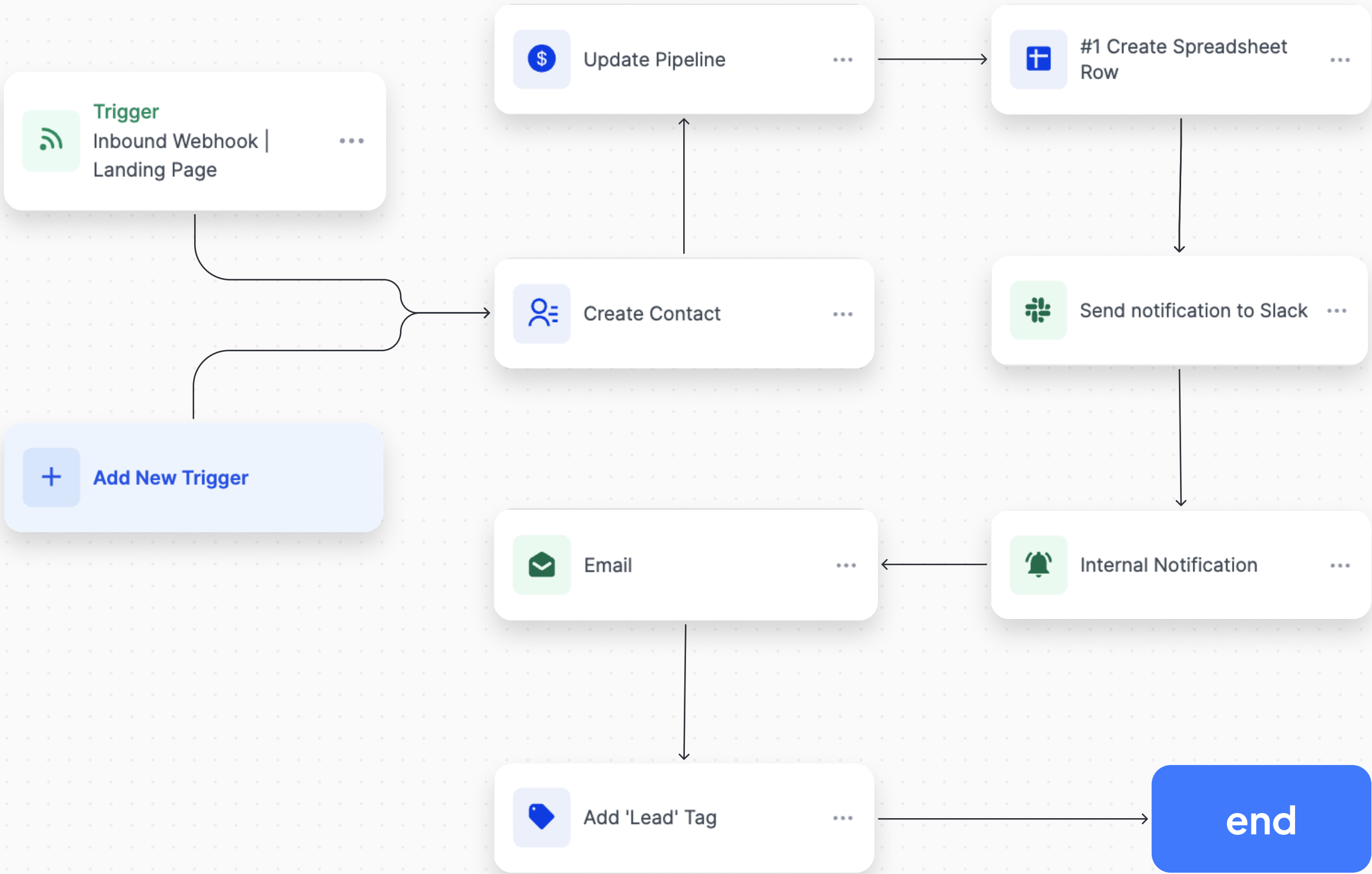
Call Booking Decision

The Purpose:

Proceed to Pre-Call Flow

What's Captured:

- All form inputs
- Suitability indicators
- Engagement behaviour
- Calculator interactions



STEP 7:

Pre-Call Flow Priming Sequence

The Purpose:

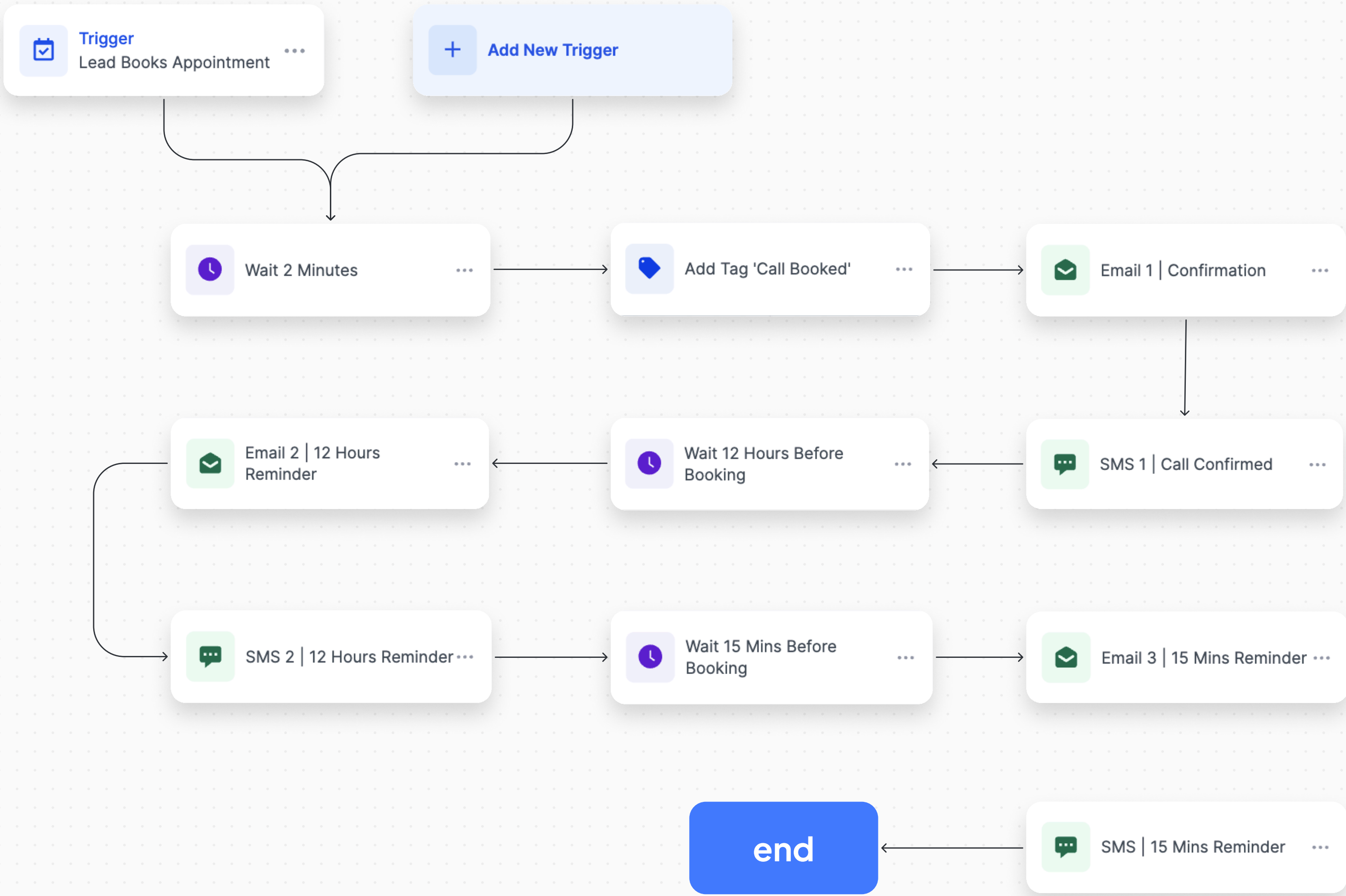
Ensure high-quality conversations.

Structure:

- 3-4 emails
- High-value
- Educational
- Sets agenda and expectations

Outcome:

- Fewer no-shows
- Better-informed prospects
- Higher-quality conversations



STEP 8:

Long-Term Nurture Fallback Path

The Purpose:
Capture long-tail demand.

- Design Intent:
- Show this as a quiet background loop
 - Non-aggressive
 - Continues delivering value

