

Jake's Tools



ZEKE DIGITAL



Free Tools

VIDEO

- Recording
 - iPhone or Android : This is the best and most accessible camera you have.
 - The wired apple/android headphones are amazing.
 - Camo - Free version is amazing
- Editing
 - CapCut - Add overlays, music, voiceovers and transitions.
- Creating presentations, memes, gifs
 - Canva
- Organizing Content Ideas
 - Trello
 - Notion

Audio

- Anchor
Posts to Apple, Google, Amazon and Spotify.

Written

- Medium and LinkedIn are two great places to write articles and newsletters.



Paid Tools

VIDEO - Low Cost options

Recording

- You can see everything I use here:
<https://kit.co/401jake>
- Canon M50 **\$500** is the DSLR camera I use.
- Camo **\$40year** - Recording or zoom with your phone camera.
- Samson Q2U **\$60** - Great Microphone.
- HyperX QuadCast **\$120** - Colorful Microphone
- Mounddog Box lights - Two for **\$80**.
- Loom **\$10mo** - Great for video and screen recording. Also, best way to email a video.
- Descript - **\$0-\$30 month** - Video/Pod Editing

Editing

- Splice **\$11yr.** - I like this a little more than CapCut. It's simple and you can pull in iTunes music.

Graphic Design

- Canva Pro **\$13mo** - Insanely powerful tool.



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Podcast Guest One Pager



WHO IS 401JA(K)E?

I've been an Advisor for 17 years with a focus in the last 7 on 401(k) and cash balance plans. I've noticed a trend of terrible marketing and selfish advice in the industry, at the cost of millions of American families.

I'm determined to change that!

Most recently, I grew my 401(k) business from \$37 million to over \$200 million in under 3 years. I also built and launched the 401(k)lub, an exclusive coaching community for advisors and wholesalers. I've been a guest speaker at multiple industry conferences, named top 401(k) Advisor in September 2020, launched a podcast, and still had time with my 5 kids (and yes they know 401(k)s well). I love what I do and I'm determined to help others win too.

MY TALKING POINTS

- Marketing vs. Branding vs. Sales - I believe these are all very different strategies necessary to find and win new 401(k) plans.
- Social Media for Advisors - How and why this is where they need to be for new business opportunities, awareness, and communication.
- Personal Branding - I will explain how and why I built my personal brand instead of using my firm's brand. Now more than ever, companies are hiring advisors for THEIR STRENGTHS.
- Operations and employee experiences in a digital post-covid world - Now that lunches and group meetings are gone, we have to learn how to utilize technology and video content to provide value.
- Focusing on a Niche - Way too many advisors try to help everyone which is a recipe to help no one. Declaring a niche and finding ways to bring value to that niche, is one of the biggest opportunities I've noticed and seen a tremendous amount of success in my own practice.

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