

# Adam Harding Investments & Planning

Using Harbor for  
High-performance paid lead conversion

[adamclarkharding.com](http://adamclarkharding.com)

PAID LEAD VOLUME

**>400** per year

NEW CLIENT ASSETS

**+\$2M**

TIME SAVED

**+15** hours per month

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*Harbor's Financial Health Quiz re-activated several old leads that I had been trying to convert for months. **One of those leads is now a \$1.5M client.** I was really impressed with the results.*



**Adam Harding**  
Founder and Principal

**ADAM HARDING** is a fee-only advisor who has built a thriving independent practice, primarily through paid lead programs like Dave Ramsey's SmartVestor Pro.

He now uses Harbor's **Financial Discovery Quiz** as the first touchpoint for every new lead. Through the built-in e-mail system, he sends a personalized quiz invite to each lead. The system also handles follow-up with leads that don't respond at first.

The tool **saves him hours** in tedious information-gathering calls with unqualified leads. Furthermore, having a professional digital tool makes his firm stand out, **significantly increasing conversion** on initial outreach.

Adam saw the impact of Harbor almost immediately. The Financial Health Quiz started a conversation with a prospect who had been on his mailing list for months. The Financial Health Quiz gave him the information he needed to eventually convert that prospect to a high-value client.

# Maximizing paid leads with Harbor

## STAND OUT AND INCREASE CONVERSION

By offering the quiz up front, prospects see immediate value from Adam. His outreach stands out from dozens of other advisors competing for attention from the same leads. From initial contact to personalized follow-ups, polished digital content **makes a strong impression and increases conversion.**

## QUALIFY LEADS WITHOUT PICKING UP THE PHONE

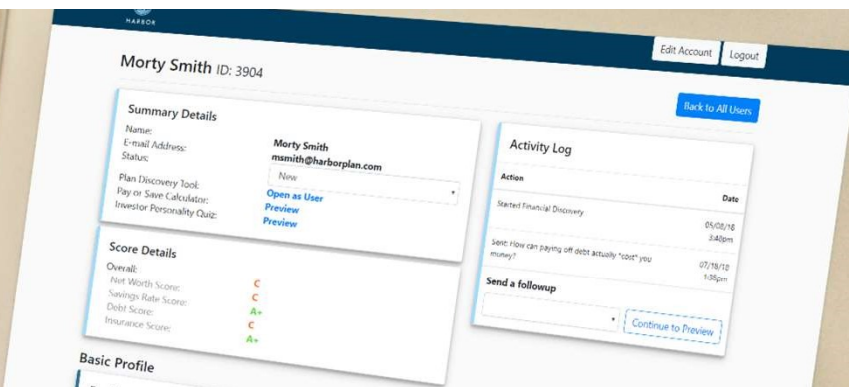
Before Harbor, Adam spent hundreds of hours on introductory calls, without knowing if they were viable clients. Now that the Financial Health Quiz collects key financial details for him, **he avoids 10-15 low-value calls a month**, and is well-informed for the calls that he does choose to take.

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*The Prospecting Assistant **saves me over \$2,000/month in productivity** by screening the most promising leads for me to focus on.*



**Adam Harding**  
Founder and Principal



To learn more about Harbor and how the **Prospecting Assistant** can help you maximize your paid leads, get in touch at [info@harborplan.com](mailto:info@harborplan.com) or [click to schedule a demo](#).

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