

# ART OF THE ELEVATOR PITCH

MODERN  
CAPITAL  
CONCEPTS

 **WealthEquity**

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CERTIFIED FINANCIAL PLANNER™

Securities offered through LPL Financial, member FINRA/SIPC. Financial planning offered through Modern Capital Concepts, a Registered Investment Advisor and separate entity.

*Tracking number I-05253785*

# INTRODUCTIONS



- CERTIFIED FINANCIAL PLANNER™ and investment manager
- Built my business, Modern Capital Concepts, from scratch.
- Empowering women is my jam.

# GOALS FOR TODAY



# NEVER GOT A JOB BASED ON RESUME



# YOUR PERSONAL BRAND



- What do you stand for?
- What are your superpowers aka gifts?
- What are your goals?
- Who is your audience?



**ELEVATOR PITCH**

What does “elevator pitch” mean to you?

How do you define it?

Why would you need one?

# WARM-UP EXERCISE: 100 WORDS



Our story is made up of many small stories. **Write 100 words** describing an event that transformed you, showed how you overcame an obstacle, or learned from failure.

# EXERCISE 1: WHAT DO YOU STAND FOR?

Write down the three things you care most passionately about and a short sentence about why these things are important to you.

1.

2.

3.



## EXERCISE 2: WHAT ARE YOUR GIFTS?

What are some things that you do really well?

What value do you bring to your teams at school or work?

*“Sometimes we overlook our own strengths because we take them for granted and forget they are special... **Once everyone understands their value**, we stop hustling for worthiness and lean into our gifts.” Brené Brown, “Dare to Lead”*

# EXERCISE 3: CLARIFY YOUR GOALS



What do you imagine yourself doing in the future? (Draw a picture)

# KNOW YOUR AUDIENCE

How do you find out what employers are looking for?

Example email:

*“Hi, I am \_\_\_\_\_ and I am interested in learning more about the culture of your organization. Do you know someone who can spend ten minutes with me?”*

## EXERCISE 4: ELEVATOR PITCH

Imagine yourself at a career event. In the room are prospective employers and potential mentors. Describe what you want to become.

*“Hi, I am \_\_\_\_\_. I am graduating in/passionate about*

*\_\_\_\_\_ and I want to be/see myself successful*

*doing \_\_\_\_\_.*

*So, tell me about you.”*

# COVER LETTERS

What makes you a good fit for your target employer?

- How do you show you have done research?
- What do you know about the company's mission?

What do you bring that makes you better than AI?

- Customer service skills?
- Creativity
- Team building
- Speed

How do you demonstrate your generalist skills?

- What is your process for moving up the learning curve?
- What do you read to learn more about an industry?

# ELEVATOR PITCH: FINAL POINTS

- Be concise and conversational.
- Don't neglect presentation.
- Leave them wanting more.



# BUILDING YOUR NETWORK

Don't assume people understand what you do or where you are going.



# ONLINE REINFORCES OFFLINE EXPERIENCE



USE ENTIRE CHARACTER  
LIMIT.

BE SELECTIVE:  
NARROWLY DEFINE  
WHO YOU SERVE.

CAST A WIDE NET WITH  
SPEAKING TOPICS

GET FEEDBACK

## **Khloé U. Karova, CERTIFIED FINANCIAL PLANNER™**

Investment manager and financial planner  
Greater Chicago Area · [Contact info](#)



Modern Capital Concepts  
Inc.



Northwestern University

CERTIFIED FINANCIAL PLANNER™ based in Chicago. I am dedicated to helping regular folks do their best to pursue their financial goals, manage their careers and life transitions. I am most passionate about helping people between the ages of 30 and 60 plan for retirement, manage cash flow, plan for their kids' college education and reduce their overall stress when it comes to money. My practice also advises women going through divorce on financial settlements. Clients have the choice of paying for service through an hourly fee, quarterly retainer or asset-based. The majority of my clients are professional women, but I would love to connect with anyone looking to make the world a better place.

Over the past 20 years, I have delivered more than 100 presentations on trading and personal finance to corporations, not-for-profits, and alumni groups. As a woman who transitioned from a global bank to founding an independent Registered Investment Advisor, I am a frequent speaker on the topic of entrepreneurship. The most popular seminars include:

"Socially Responsible Investing" at Chicago Public Library

"Investing 101" at Federal Reserve Bank's Money Smart Week

"Essential Money Skills for Young Professionals" at PepsiCo

"Women and Money" at Uptake

"Sales for Start-Ups" and "Asset Protection and Estate Planning" at University of Chicago Women's Business Group



# ONLINE REINFORCES OFFLINE EXPERIENCE

PEOPLE SCAN NOT  
READ. BULLET POINT  
LIST YOUR SERVICES.

Founder and President, Financial Advisor and CERTIFIED FINANCIAL PLANNER™

Modern Capital Concepts, Inc.

Dec 2013 – Present • 4 yrs 4 mos

Chicago, IL

Personal financial planning

- Cash Flow and Student Loan Management
- Investment Education
- Retirement Saving and Planning
- College Saving / Financial Aid Strategies
- Insurance Needs Analysis
- Tax and Estate Planning
- Divorce Financial Analysis
- Small Business / Start-up Advisory

Investment management asset minimum is \$100,000 for conventional strategies or \$25,000 for Sustainable-ESG (socially responsible) investing.

Modern Capital Concepts is a financial services firm as well as a benefit corporation in Chicago. In addition to maximizing profits for shareholders we seek to fulfill our mission for the benefit of the communities in which we operate.

Our mission is to empower working families, professionals, retirees and small business owners to establish positive financial behaviors, grow their wealth and pursue their life goals through an interdisciplinary approach combining financial education and personalized counseling.

We are committed to our community by sponsoring financial clinics to low-income residents and donating a portion of profits to community organizations.

CONNECT ON VALUES. IF  
PEOPLE LIKE YOU THEY  
WILL GIVE YOU A  
CHANCE.

# ONLINE REINFORCES OFFLINE EXPERIENCE

UPLOAD MEDIA, SPEAKER BIO, MENU OF SERVICES - SOMETHING TO GIVE A REALISTIC PREVIEW OF WHAT TO EXPECT WORKING WITH YOU.

## Media (2)



## Financial Advisor

Edward Jones

Jan 2010 – Dec 2013 • 4 yrs

## Strategy Manager

LEHMAN BROTHERS

Lehman Brothers

Mar 2006 – Sep 2008 • 2 yrs 7 mos

Served as trusted advisor to equity trading division executives. Facilitated monthly discussions among senior management to define long-term goals and implementation strategies. Areas of expertise: institutional equity trading, stock exchange technology, hedge fund strategies.

DON'T GO BACK MORE THAN 10 YEARS (LESS RELEVANT EXPERIENCE FOR MOST).

# FINAL THOUGHTS

*“At the end of the day people won't remember what you said or did, they will remember how you made them feel.”*

*Maya Angelou*

# ACTION PLAN

**Write down at least three things you can do right now.**

**1. Connect with Khloe Karova on LinkedIn.**

**2.**

**3.**

**4.**

**5.**

Khloé U. Karova is a Certified Financial Planner™ based in Chicago and owner of Modern Capital Concepts, a Registered Investment Advisor and benefit corporation. Since 1998, Khloé has held management positions in equity trading and investment management. She has counseled CEOs and CFOs on strategic planning, as well as, middle-class households on saving for retirement and getting out of debt. Khloé is most passionate about providing tools and resources to mid-career professionals to enable them to rationalize their household balance sheet, boost their income and saving, or radically change their career trajectory. She has given over 100 seminars on sustainable investing, financial planning and entrepreneurship and is a regular speaker at Money Smart Week®.

Khloé has an MBA with honors from the University of Chicago Booth School of Business where she served as president of the University of Chicago Women's Business Group from 2013-2014. She also holds a BA in Art History and Organizational Behavior from Northwestern University.

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