DIY Advisor GPT Quick Start Kit

Build Your Own Custom GPT in 10 Minutes

What's Inside

1. Why build your own Advisor GPT
2. Step-by-step Quick Start
3. Privacy, security & compliance FAQs
4. Do's and Don'ts (simple safety rules)
5. 10 Ideas for Custom GPTs you can build
6. Pro tips for easy success
7. Try the WE Advisor GPT (your starting point)

Why This Matters

AI is changing how advisors prepare, meet, and follow up with clients. You don't need to be technical — you just need a little time to experiment and see how it fits into your workflow.

A Custom GPT becomes your own personal version of ChatGPT that speaks your firm's language, follows your process, and helps you work faster without replacing your expertise.

Think of it as an assistant that's trained on *your* materials and can support you before, during, and after client work.

© 2025 ProjectWe

What Your Custom GPT Can Do

Use it to:

- **Prep for owner meetings**
  Create call agendas, key questions, red flags, and areas to explore.

- **Summarize conversations**
  Paste meeting notes or transcripts and get clean recaps and next steps.

- **Write follow-ups**
  Draft emails, thank-yous, summaries, and action plans.

- **Draft proposals or workshop agendas**
  Turn scribbled notes into structured scopes, agendas, and deliverables.

- **Help train new team members**
  Explain your process, frameworks, discovery flow, or service model.

- **Turn your content into usable tools**
  Take your PDFs, checklists, and frameworks and turn them into prompts, steps, or templates.

- **Help with internal prep**
  Outline talking points, create checklists, or generate role-play questions for training.

What It Should *Not* Do

A Custom GPT is useful, but it's not a replacement for professional judgment.
It should not:

- Give legal, tax, or valuation advice

- Use client data

- Replace compliance-reviewed materials

It *supports* advisors — it doesn't become the advisor.

© 2025 ProjectWe

Step-by-Step: Build Your Own Advisor GPT

You'll need: a ChatGPT Plus account ($20/month).

Step 1 – Open the Builder

Go to chat.openai.com/create → click **Create a GPT**.

Step 2 – Name It

Choose something clear and simple:

- *Summit Advisors GPT*
- *NextStage Exit Coach*
- *Legacy Planning Assistant*

Step 3 – Add a Description

Explain what it's for in one line. Example:

> "Helps business owners prepare for growth or exit by guiding discovery meetings and creating action steps."

Step 4 – Add Instructions

This is where you give your GPT its "job description." The more specific you are, the more consistently it behaves. Short instructions work to start, and adding detail helps the GPT follow your exact process, tone, and boundaries.

If you're not sure where to start, copy the sample below into the Instructions box. You can customize the tone or add specifics about your process.

Or, click **"Create"** and let ChatGPT generate a first draft of your instructions.

© 2025 ProjectWe

Sample Instructions

You are a wealth advisor-focused GPT that helps business owners prepare for growth or exit.
Your role is to support advisors by organizing information, asking smart questions, and generating clear, practical next steps.

How you work:

- Start by asking 4-6 open-ended discovery questions to understand goals, challenges, timing, and priorities.
- Use a calm, friendly, professional tone. Avoid jargon and overly complex explanations.
- Keep responses concise (150-250 words unless otherwise requested).
- Use bullet points whenever summarizing or listing recommendations.
- When creating emails, keep them short, human, and structured: greeting → summary → 3 action steps → close.
- Reference the uploaded materials when relevant and incorporate our firm's language (e.g., "owner," "readiness," "next steps").
- When summarizing conversations or notes, always include:
    1. key themes,
    2. opportunities,
    3. risks,
    4. recommended next actions.

Boundaries:

- Never give legal, tax, valuation, or compliance advice.
- If asked about financial planning, valuation, taxes, or legal structures, explain general concepts and recommend speaking with a qualified professional.
- Do not assume financial data or make up numbers. Ask for information if needed.

Your purpose:
Help advisors work faster by preparing for meetings, summarizing discussions, drafting follow-ups, and organizing next steps — without replacing professional judgment.

© 2025 ProjectWe

Step 5 – Add Knowledge

Upload a few short PDFs or text documents (under 20 MB each).
Think of these as the “brains” of your GPT.

Good examples:

- Your discovery question list
- A service overview or one-pager
- A short case study or testimonial
- A checklist or guide you share with clients
- An article or framework you’ve written

Tip: Single-column text reads best. Break long content into smaller, readable files.

Step 6 – Add Conversation Starters

These appear on the GPT home screen. Try:

- “Help me prep a 30-minute discovery call with a $10M owner.”
- “Draft a follow-up email after our first meeting.”
- “Outline 3 next steps for an owner planning to exit in 18 months.”

Step 7 – Capabilities

For now, **keep it simple**:

- Browsing: Off
- Code Interpreter: Off
- Actions: None

© 2025 ProjectWe

Step 8 – Test It

Try a few real-life prompts to see how your GPT behaves.

Run Quick Tests, for example:

Use short, practical prompts you'd actually use with a client:

1. Prep Test
"Help me prep a 30-minute discovery call with a $10–15M owner."

2. Follow-Up Test
"Draft a recap email with 3 key takeaways."

3. Knowledge Test
"Using my uploaded discovery questions, outline what I should ask an owner planning to exit in 18–24 months."

If anything feels off — tone, length, missing context — just adjust the Instructions.

How to Fix Behavior

1. Identify what's wrong
Examples: too long, too generic, missing your materials, giving advice you don't want it to.

2. Add one or two sentences to your Instructions
Examples:

- "Keep responses to under 150 words."
- "Ask 5–7 questions before giving recommendations."
- "Use my uploaded PDFs when relevant."
- "Never give legal, tax, or valuation advice."

3. Re-test using the same prompt
This confirms your fix worked.

© 2025 ProjectWe

Pro Tip - Use a separate ChatGPT window as a “debugger.” Paste your Instructions, show what went wrong, and say: “Rewrite the instructions so it behaves this way.” It will help you tighten and refine your custom GPT quickly.

Troubleshooting Table

What You See	What It Means	Quick Fix (Add to Instructions)
Responses are too long	It’s defaulting to full explanations	“Keep answers concise and under 150 words.”
It isn’t using your PDFs	It needs clearer direction	“Prioritize information from my uploaded materials.”
Tone sounds generic	It needs your voice defined	“Write in a friendly, professional tone that’s direct and jargon-free.”
It jumps to conclusions without questions	It needs a discovery step	“Ask clarifying questions before offering recommendations.”
It starts giving tax/legal/valuation advice	It needs compliance boundaries	“Never give legal, tax, or valuation advice. Explain concepts only.”
It’s overly cautious or keeps disclaiming	It’s overcorrecting on safety	“Avoid unnecessary disclaimers. Keep answers practical and helpful.”
It asks *too many* questions	Your instruction block is too open-ended	“Ask no more than 5 key questions before giving next steps.”
Emails sound stiff	It needs tone/formatting help	“Write emails that are clear, human, and under 6 sentences.”
It repeats itself	It’s unclear on brevity	“Avoid repeating ideas. Keep writing clean and direct.”

Step 9 – Share It

Click **Share** → **Anyone with the link** (or Invite Only). Each person uses their **own ChatGPT account**, so you don’t pay for their usage. You can change the visibility anytime.

© 2025 ProjectWe

Privacy & Security FAQs

Q: Can others see my chats?
No. Each user's conversations stay private to their own ChatGPT account.
Even the GPT creator can't see what you type.

Q: Does OpenAI train on my data?
No. Chats and uploaded files in ChatGPT aren't used to train OpenAI models.

Q: Is it okay to upload client information?
No. Only upload general materials or redacted examples.
Yes to templates, guides, articles, or training content.
No to client names, reports, or confidential financials.

Q: What if my firm wants stronger controls?
Use OpenAI's Team or Enterprise plans — they provide organization-level privacy, encryption, and admin tools.

Do's and Don'ts

Do	Don't
Upload only firm-owned, non-confidential materials	Upload client or personal data
Keep files short (under 10–20 pages each)	Upload entire manuals or databases
Give clear, brief prompts ("help me draft a recap")	Type vague requests ("do something")
Review and edit outputs	Assume it's 100% correct
Use it as a coach or helper	Treat it as compliance-approved advice

© 2025 ProjectWe

10 Custom GPT Ideas for Advisors

1. **Discovery Coach GPT** — Guides your first owner meeting using key questions.
2. **Exit Planning Assistant** — Creates 30/60/90-day plans and next-step checklists.
3. **Follow-Up Writer** — Drafts thank-you and recap emails automatically.
4. **Marketing Post Generator** — Turns ideas or notes into short LinkedIn posts.
5. **Team Training GPT** — Explains internal processes to new staff.
6. **Valuation Prep GPT** — Lists documents and data to gather before a valuation.
7. **"Prep My Call" GPT** — Analyzes meeting notes and suggests what to ask next.
8. **Workshop Builder** — Outlines agendas, key points, and slides.
9. **Proposal Builder** — Drafts scopes of work and deliverables.
10. **Client FAQ Bot** — Answers standard questions using your website content.

Want to Try a CustomGPT?

Try our custom Advisor GPT first — a ready-to-use example trained on:
- *6 Questions That Get the Attention of Business Owners*
- *Exit Planning Tips & Traps - Discovery Meeting planning guides*

It helps you:

- Prep your next owner meeting
- Ask the right questions
- Spot exit traps
- Draft a 30/60/90-day plan

Try it HERE

© 2025 ProjectWe