

Marketing CHECKLIST

For Financial Advisors

Financial advisors often struggle to effectively market their services. This simple checklist, combined with our pre-existing marketing assets, can help you promote your services and attract new clients.

1. Getting Started

Many advisors find themselves investing time or money into marketing without a clear plan. Start by clarifying your goals and target audience:

- Review the Focus Stage in the Advisor Growth Journey™ for an introductory overview
- Complete the Marketing Plan Builder, which provides a step-by-step guide to help you achieve a positive ROI
- Complete the Bridge Talk Builder™ to get clear on who you help and what problems you solve
- Complete the Brand Finder to define your unique value proposition

2. Digital Marketing

Website:

- Ensure your website is professional and clearly explains your services and value proposition. Some already-existing assets you can use are:

Videos:

- The Planning Horizon®
- The Life Stages
- Blueprint Animation

Copy:

- Marketing Copy for Advisor Websites document

Graphics:

- The Planning Horizon®
- Wealth Optimization System™
- Values-based Infographic
- Financial Literacy for Children Infographic
- Wealth Optimization System™ animated gif
- Navigating the Life Stages animated gif

- Have a lead magnet to collect information. Some already-existing lead magnets you can use are:

- The Financial Literacy Guide for Children
- The Financial Literacy Guide for Teenagers
- Retirement Planning Questionnaire
- Financial Fears Survey

Digital Marketing - *Continued*

Social Media:

- Be active on platforms relevant to your target market (LinkedIn, Facebook, Twitter) and consistently share valuable content. Some pre-existing assets you can use are:
 - Pre-Written Blogs
 - Financial Fears Survey
 - Values-based Infographic
 - ChatGPT Marketing Prompts
 - The Financial Literacy Guide for Children
 - The Financial Literacy Guide for Teenagers
 - Retirement Planning Questionnaire

Email Marketing:

- Send regular newsletters or updates to clients and prospects. Some pre-existing assets you can use are:
 - Pre-written blog posts
 - Financial Fears Survey
 - Values-based Infographic
 - The Financial Literacy Guide for Children
 - The Financial Literacy Guide for Teenagers
 - Retirement Planning Questionnaire

3. Offline Marketing

Networking:

- Attend industry events and conferences
- Join local chambers of commerce to build relationships within your community

Public Relations:

- Seek media coverage for your firm or expertise
- Identify relevant publications or journalists

Direct Mail:

- Send targeted direct mail campaigns to potential clients. Some already-existing assets you can use are:
 - Values Cards
 - The Future of You book

4. Client Relationship Management

Introductions:

- Ask satisfied clients for introductions. Some already-existing assets you can use are:
 - Active Promoters and the Legacy Introduction Process
 - Sample Marketing Letters

Client Events:

- Host client events or educational seminars. Some ideas for events are:
 - Values Cards event
 - Retirement Planning Event using the Retirement Planning Questionnaire
 - Seminars for parents using the Financial Literacy Guides
 - Marketing Plan Builder to plan the event

Effective marketing is an ongoing process that requires consistent attention. By regularly reviewing this checklist and utilizing our pre-existing marketing assets, you'll free up more time for business development and working with clients.