

Your 2017 Advisor/Client Marketing Checklist



Get all of your 2017 marketing done in just one phone call!

Dear Advisor,

Need a marketing plan for 2017? Time to set up a monthly drip? Strategize a workshop schedule? Meet some CPAs?

The **Advisor/Client Marketing Program** helps you achieve these kinds of goals and more. As a member, you can download and brand over 60+ marketing campaigns... educational PowerPoint presentations... 100+ client-facing articles... sales letters... emails... social media... lead magnets and more. Branded with your picture and contact information.

All campaigns come with step-by-step checklists, toolkits and FINRA review letters when needed. Take a look at some of our most popular campaigns:



- Send a branded **“Financial Insights”** touch every month to stay top-of-mind with clients.
- Launch a series of **Retirement Income workshops** that generate introductions and referrals.
- Host one or more **Social Security seminars for CPAs** and offer continuing education (CPE) credits.
- Download the **“21 Key Stats” lead magnet** to attract website leads.

But this is no DIY program. As part of your membership, you get real-time industry guidance from Sean Bailey, Editor-in-Chief, and his team of marketing experts. In our monthly webinars, we act as your chief marketing officer to keep you organized, on track and most of all – visible!

For a complete list of upcoming webinars, see the **2017 Advisor/Client Marketing Checklist** on the following pages. (We reserve the right to change topics as market conditions warrant.)

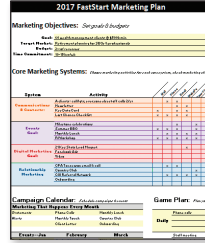
Join today and check off the marketing box on your 2017 business plan. Whether you need a marketing plan, content strategy, workshop PPT, or CPE credit, you can get it all in Advisor/Client.

YOUR 2017 ADVISOR/CLIENT MARKETING CHECKLIST

JANUARY 5th

Advisor Marketing Boot Camp, Session 1 Build Your "We Will Conquer!" Marketing Plan for 2017

Attack 2017 with a marketing plan that brings in the leads and positions you as the 'go-to' advisor in your target market.



FastStart Marketing Plan

- Complete profile
- Download marketing plan worksheets
- Assess last year's marketing

JANUARY 12th

Advisor Marketing Boot Camp, Session 2 Establish Your Communications Masterplan for 2017

Set up a communications game plan that keeps you top-of-mind, month-after-month, with clients, prospects, referrals, and COIs.



2017 Key Data Postcard

- Review Key Data Card branding
- Click to order
- Personalize cover letter
- Distribute

JANUARY 19th

Advisor Marketing Boot Camp, Session 3 Strategize Your 2017 Presentations and Event Plan

Get in front of 30 prospects at once! Produce a social and educational events plan that attracts large turnouts with the least amount of effort and expense.



Retirement Income Workshop

- Download PPT and script
- Brand marketing materials
- Begin promotion
- Host workshop
- Follow-up

JANUARY 26th

Advisor Marketing Boot Camp, Session 4 Create Your 2017 Digital Marketing Plan

Design a simple digital marketing plan that generates leads, raises your visibility, and transforms your website into a busy marketing hub.



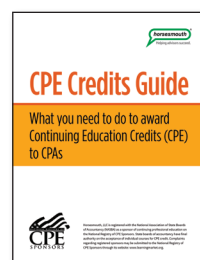
21 Key Stats Lead Magnet

- Download lead magnet
- Brand landing page
- Set up ads
- Download follow-up emails

FEBRUARY 9th

Advisor/CPA Strategize Your 2017 COI Marketing Plan

Strategize 12 months of marketing activities to help you meet and cultivate your best centers-of-influence (COIs), especially CPAs.



CPE Credit Guide

- Download marketing toolkit
- Review CPE Credit Guide
- Build COI list
- Select marketing activities

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FEBRUARY 23rd

Design the Ultimate Marketing Kit for 2017

Create a multi-purpose, high-impact, marketing kit that establishes your credentials and gets you referred by clients, prospects and COIs.



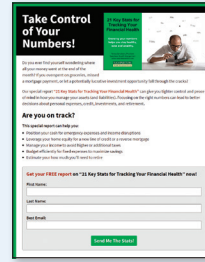
List of Services Template

- Download Excel template
- Choose services
- Brand with picture and logo
- Distribute

MARCH 16th

How to Hold a Lead-Generating Webinar

Double the effectiveness of your workshops and seminars by adding webinars that will pull in "too-busy-to-meet" prospects without you ever leaving your office.



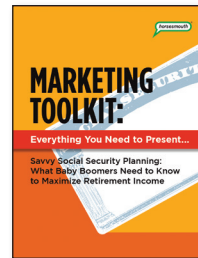
Lead Gen Landing Page

- Download PPT
- Choose provider
- Download ads and landing page
- Host webinar
- Follow-up with emails

MARCH 30th

Advisor/CPA How to Get in Front of CPAs This Summer

Form close strategic alliances with 10 CPAs this summer by following a specific system that demonstrates your expertise, builds trust, and drives referrals.



Social Security Presentation

- Decide on introduction strategy
- Review workshop presentations
- Formulate COI value prop

APRIL 6th

Tap Into a Whole New World of Warm Prospects with Super Simple Facebook Ads

Create some lead-generating Facebook ads that can drive traffic to your website, your workshops, and your business.



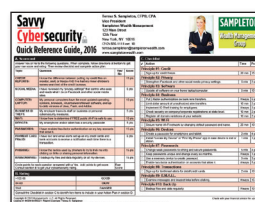
21 Key Stats Display Ad

- Download marketing toolkit
- Choose headline and copy
- Set budget
- Create ad

MAY 18th

Your Summer Action Plan

Take your prospecting to the beach with these breezy marketing ideas that will get you in front of referrals and prospects all summer long.



Cybersecurity Scorecard

- Download branded postcard
- Distribute
- Host cybersecurity workshops

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JUNE 15th

Simple, Easy, Cost-Effective Ways to Get Started with Video

Ready, set, ACTION! Go Hollywood with this step-by-step guide on how to create videos that increase your reach, your website traffic and your Google ranking.



Explainer Video

- Download sample script
- Decide on DIY or pro
- Choose hosting platform
- Post video

JULY 13th

Hot-Button Client Workshops for Fall

Get in front of pre-retirees with education workshops that tap into clients' hot button retirement issues.



Retirement Income PPT

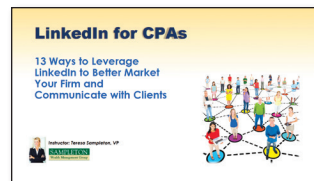
- Download PPT and script
- Download branded postcard
- Promote workshop
- Follow-up

JULY 27th

Advisor/CPA

Fall Marketing With CPAs

Set up a series of client education workshops and high-level strategy meetings with your favorite COI(s).



LinkedIn for CPA Workshop

- Download workshop PPT
- Invite CPAs
- Award CPE certificates
- Follow-up

SEPTEMBER 14th

Fall Marketing Ideas for Clients and Prospects

Make this your best year ever with some easy marketing efforts you can roll out quickly to bring in new business, eager referrals, and held-away assets.



Last Chance Checklist

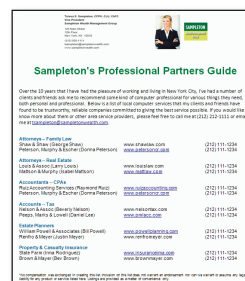
- Review branding
- Click to order
- Distribute
- Set appointments

SEPTEMBER 21st

Advisor/CPA

How to Get More Referrals from CPAs

Build a "network of experts" whose sole purpose is to exchange referrals, expand your service mix, and promote your business.



Referral Guide

- Download marketing toolkit
- Review COI list
- Decide on theme and format
- Distribute

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OCTOBER 12th

How to Find a New Niche for 2018

Zero in on a new target market for 2018 that can energize your prospecting and position you as the big fish in a profitable pond.

Strengths (Internal) Competitive advantages Unique selling points Supporting resources Reach/ Distribution/Awareness Price/Value/Quality Designations/Education	Weaknesses (Internal) Competitive disadvantages Lack of resources Reputation/Vulnerabilities Financials Service issues
Opportunities (External) Market developments Competitor vulnerabilities Demographics/Trends COIs/Prospects Usage Product awareness Price	Threats (External) Market developments Regulations Competition/Competitive products Usage Demographics/Trends Price Sales cycle

Niche Strategy Worksheets

- Download worksheets
- Segment client list
- Conduct information interviews

NOVEMBER 2nd

How to Market Yourself Into a New Niche

Break into a new target market with this 10-step plan for impressing niche leaders and establishing your credentials.

Month	Communications	Reports	Tier
Jan	Investment Committee Meeting	4Q & Year End Review	Tier 1: CNA & Attnys
Feb	Contact CPA for tax needs	Send client's financial summary	Tier 1 & 2 All
Mar	CPA lunch/light buffet		Tier 1: CNA
Apr	"Thank God it's Over" open house	1Q Review	Tier 1 & 2 CNA
May	COI Roundtable		Tier 1 & 2 All
Jun	Portfolio review meeting		Tier 1 & 2 CNA
Jul	Email article with topic		Tier 1 & 2 All
Aug	Invite to social event/cocktail	2Q Review	Tier 1 & 2 All
Sep	Phone call/visit		Tier 1: CNA & Attnys
Oct	Invite to educational workshop	3Q Review	Tier 1 & 2 All
Nov	COI/Client Year End Meeting		Tier 1: CNA & Attnys
Dec	Holiday Open House		Tier 1 & 2 All

COI Drip Schedule

- Download marketing toolkit
- Create niche marketing kit
- Contact COIs
- Schedule event

DECEMBER 7th

2018 Killer Marketing Ideas and Trends

New marketing ideas, campaigns, and techniques to consider for a brand new year.



2018 Advisor Marketing Calendar

- Download calendar
- Review
- Select dates for marketing campaigns

Take Care of Next Year's Marketing Now!

Enroll in the **Advisor/Client Marketing Program** today and by this time next year, you'll have a communications plan, digital strategy, and other marketing systems in place and ready to ramp up for 2018.

Join Advisor/Client Today!

Visit www.horsemouth.com/advisorclient or call (888) 336-6884 ext. 1

100% Satisfaction Guaranteed or Your Money Back!