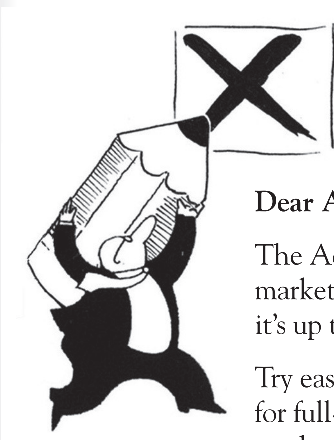
MY 2013 ADVISOR/CLIENT MARKETING CHECKLIST



Dear Advisor:

The Advisor/Client Marketing Program is a continuous system. There's always a predesigned marketing activity to personalize and launch. More than 29 activities per year. Do some or all; it's up to you and your team.

Try easy client touches like article reprints. Or send helpful client guides and checklists. Or go for full-blown retirement seminars and COI events. You also get skills programs on referrals, marketing and client events.

DATE	CAMPAIGN/PROGRAM	DESCRIPTION	ACTIONS	DONE
JANUARY	Monthly Client Touch	Send Key Data or choose article from Client Reprint Library	☐ Add personalization ☐ Order hard copies of KD ☐ Post to web, social media ☐ Mail hard copies	☐
January 10	**Key Data Mini-Campaign**	Send Key Financial Data to clients, prospects and COIs	☐ Add personalization ☐ Order hard copies of KD ☐ Post to web, social media ☐ Mail hard copies	☐
January 24	Marketing Boot Camp – **# 1: Your Marketing Strengths & Opportunities — Revealed!**	Conduct a Situational Analysis to help you determine the best 2013 marketing plan for you	☐ Decide on marketing channel weightings	☐
January 31	Marketing Boot Camp – **# 2: Rock 2013 with a 1-Page Marketing Plan**	Write a 1-page marketing plan that systemizes your 2013 marketing	☐ Complete one schedule of campaigns, activities and communications	☐
FEBRUARY	Monthly Client Touch: Key Planning and Investment Deadlines Quarterly Post Card (Spring) or Article reprint	Alert clients and prospects to next quarter's key deadlines.	☐ Add personalization ☐ Order hard copies ☐ Post to web, social media ☐ Mail hard copies	☐
February 7	Marketing Boot Camp – **# 3: 6 Hot-Button Marketing Messages Every Advisor Needs**	Create 6 persuasive marketing messages that build relationships & generate interest in your business	☐ Create new positioning statement ☐ Apply to all marketing messages	☐

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February 14	Marketing Boot Camp – **# 4: Create Convincing Leave-Behinds for Prospects & COIs**	Produce compelling marketing materials that enhance your credibility with clients, prospects & COIs	☐ Create brochure ☐ Develop media kit ☐ Design marketing handout	☐
MARCH	Monthly Client Touch: Article reprint	Choose article from Client Reprint Library	☐ Add personalization ☐ Order hard copies ☐ Post to web, social media ☐ Mail hard copies	☐
March 14	**COI Roundtable: HNW Planning Post Fiscal Cliff (tentative) for May or June**	COI Campaign: Organize a meeting of local CPAs, attorneys, and other COIs to discuss taxes and planning implications for 2013	☐ Review Roundtable plan ☐ Start planning with team ☐ Secure location ☐ Send invitations ☐ Prepare materials	☐
March 28	**Spring-Summer Client Event Planning Clinic-Webinar**	Review options for seasonal Cli-ent Events	☐ Choose Client Event types ☐ Schedule and start plan	☐
APRIL	Monthly Client Touch: Article reprint	Choose article from Client Reprint Library	☐ Add personalization ☐ Order hard copies ☐ Post to web, social media ☐ Mail hard copies	☐
April 11	**Retirement Income Planning Workshop for May or June**	Host a retirement planning workshop in your community that pre-retirees will rush to attend	☐ Set date and reserve location ☐ Kickoff marketing: emails, postcards, calls, etc. ☐ Practice presentation	☐
April 25	Referral Clinic **#1: Build a 1-Page Referral Letter That Reminds Clients of All You Do**	Customize and send a simple referral letter that reminds clients of all the resources you offer and asks for a referral	☐ Attend/review webinar ☐ Draft letter and get critiques ☐ Print and mail	☐
MAY	Monthly Client Touch: Key Planning and Investment Deadlines Quarterly Post Card—Summer or Article reprint	Alerts clients and prospects to next quarter's key deadlines	☐ Add personalization ☐ Order hard copies ☐ Post to web, social media ☐ Mail hard copies	☐
May 9	Rich Niche Prospecting – **#1: Zero in on Perfect Niche**	7 steps for nailing a target market and capturing the attention of niche leaders	☐ Complete value questionnaire ☐ Segmenting clients spreadsheet ☐ Mapping your social connections	☐
May 16	Rich Niche Prospecting – **#2: Develop Your Niche Expertise & Marketing Plan**	Create a marketing plan that showcases your expertise and thrusts you into your new niche	☐ Pain points and solutions ☐ Profile your ideal client ☐ Create positioning statement ☐ Marketing plan	☐
JUNE	Monthly Client Touch: Article reprint	Choose article from Client Reprint Library	☐ Add personalization ☐ Order hard copies ☐ Post to web, social media ☐ Mail hard copies	☐

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June 6	Rich Niche Prospecting – **#3: Launch Your First Niche Campaign**	Build a marketing plan, marketing materials, & a COI referral strategy that gets you in front of your niche	☐ Develop your first niche campaign	☐
JULY	Monthly Client Touch Activity: Article reprint	Choose article from Client Reprint Library	☐ Add personalization ☐ Order hard copies ☐ Post to web, social media ☐ Mail hard copies	☐
July 11	**Capture More Retirement Rollover Business: The Lunch & Learn Campaign**	Launch a series of rollover lunch & learns that get you in front of the retirement decision	☐ Attend/review webinar ☐ Plan and market Lunch n' Learn for pre-retirees	☐
July 25	**Fall/Winter Client Event Planning Clinic**	Review options for seasonal client events	☐ Choose Client Event types ☐ Schedule and start plan	☐
AUGUST	Monthly Client Touch: Article reprint	Choose article from Client Reprint Library	☐ Add personalization ☐ Order hard copies ☐ Post to web, social media ☐ Mail hard copies	☐
August 15	**Referral Clinic #2: Build Your Referral Muscle**	Key strategies & tactics for generating more referrals before year end	☐ Attend/review webinar ☐ Modify letter from template ☐ Print and send in September	☐
SEPTEMBER	Monthly Client Touch: Key Planning and Investment Deadlines Quarterly Post Card (Fall) or Article reprint from Client Reprint Library	Alerts clients and prospects to next quarter's key deadlines	☐ Add personalization ☐ Order hard copies ☐ Post to web, social media ☐ Mail hard copies	☐
September 5	**2013 Last Chance Financial Planning Checklist Campaign:**	47 Questions to Ask Clients & Prospects to Reveal New Opportunities & Deliver Your Best Service	☐ Review webinar/strategy brief ☐ Add personalization ☐ Promote on email/social media ☐ Call clients and prospects ☐ Hold meetings	☐
OCTOBER	Monthly Client Touch: Article reprint	Choose article from Client Reprint Library	☐ Add personalization ☐ Order hard copies ☐ Post to web, social media ☐ Mail hard copies	☐
October 3	**COI Connect Campaign:**	Win the gratitude & referral business of COIs with a simple win-win campaign that establishes you as a community connector	☐ Review webinar/strategy brief ☐ Start list development research ☐ Build out list per instructions ☐ Start contact campaign	☐
NOVEMBER	Monthly Client Touch: Article reprint	Choose article from Client Reprint Library	☐ Add personalization ☐ Order hard copies ☐ Post to web, social media ☐ Mail hard copies	☐

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November 7	**Winter/Spring Client Event Planning Clinic**	Review options for seasonal client events	☐ Choose Client Event types ☐ Schedule and start plan	☐
November 14	**Build Your Own HNW Prospect List**	Create your own in-house list of top prospects in your niche or community	☐ Review webinar/strategy brief ☐ Start list development research ☐ Build out list per instructions ☐ Start contact campaign	☐
November 21	**Key Birthdays 2014 Post Card**	Ask clients, prospects, and COIs if they know anyone crossing these landmark birth dates	☐ Add personalization ☐ Order hard copies ☐ Post to web, social media ☐ Mail hard copies	☐
DECEMBER	Monthly Client Touch: Key Planning and Investment Deadlines Quarterly Post Card (Winter 2014)	Alerts clients and prospects to next quarter's key deadlines	☐ Add personalization ☐ Order hard copies ☐ Post to web, social media ☐ Mail hard copies	☐
December 5	**2014 Financial Fitness Checklist Campaign**	57 Questions You Must Ask Clients & Prospects Every Year to Reveal New Opportunities & Deliver Your Best Service	☐ Add personalization ☐ Order hard copies of KD ☐ Post to web, social media ☐ Mail hard copies	☐

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