

# SOLUTIONS DELIVERED

Every firm is at a different stage of growth, so the right marketing priorities will look different from firm to firm. What follows is a comprehensive menu of areas we could work on together.

**Not every firm needs all of these**, and part of my role is to help you identify which initiatives will move the needle fastest for your business.

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## Strategy & Leadership

- Define marketing strategy aligned to firm growth goals
- Clarify value proposition & positioning vs. competitors
- Identify and refine ideal client avatars (HNW, UHNW, retirees, business owners)
- Map client journey from awareness → referral
- Establish KPIs & dashboards (lead flow, pipeline, ROI)
- Quarterly & annual planning
- Budget allocation & spend oversight
- Hire, train, and manage marketing staff/contractors
- Vendor management (SEO, design, PR, tech stack, etc.)

## Brand & Messaging

- Brand story & messaging framework
- Visual identity refresh (logo, colors, brand guide)
- Firm narrative / origin story
- Advisor bios that build trust
- Compliance-approved content strategy

## Website & Digital Presence

- New website build or modernization
- Website copywriting & SEO optimization
- Conversion-focused landing pages
- Lead capture systems
- Blog/article content for SEO & thought leadership
- Analytics & heatmap tracking
- Google Business Profile optimization

## Content Marketing

- Blog/article library on financial topics
- Whitepapers, guides, and eBooks (lead magnets)
- Case studies & success stories
- Video scripts and production oversight
- Podcast creation or guesting strategy
- Social media content calendar (LinkedIn, Facebook, YouTube, etc.)
- Client/prospect newsletters (email or print)

## Email & CRM Systems

- Automated welcome/onboarding sequences
- Nurture campaigns for prospects
- Reactivation campaigns for stale leads
- Segmentation & personalization strategies
- CRM setup, automation, and reporting
- Annual client surveys

## Advertising & Lead Gen

- Paid search strategy (Facebook, LinkedIn, Google)
- Geotargeting for local HNW audiences
- Event promotion campaigns (seminars, webinars, dinners)
- Direct mail integration (to amplify digital campaigns)
- ROI tracking & campaign optimization

## Events & Community

- Educational workshop strategy (retirement, taxes, estate planning)
- Client appreciation events
- Strategic partnerships (CPAs, attorneys, local business owners)
- Sponsorships & community involvement
- Referral system design & promotion

## Client Experience & Retention

- Onboarding process (welcome kits, messaging, touchpoints)
- Client communication calendar (birthday cards, market updates, check-ins)
- Referral request systems (scripts, incentives, timing)
- Surveys & testimonials collection
- Video testimonials from clients

## PR & Thought Leadership

- Press releases
- Local media outreach (newspaper, radio, business journal)
- Industry publication submissions
- Award submissions
- Speaking engagements (conferences, chambers, webinars)

## Compliance & Risk Management

- Align marketing with SEC/FINRA/State compliance standards
  - Create compliant ad, email, and content review process
  - Build marketing archives for audit readiness
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