

MARKETING COMMUNICATION **SOLUTIONS FOR** FINANCIAL PROFESSIONALS

A successful marketing campaign requires a strategy that delivers frequent and relevant communications. Whether you're trying to build and strengthen your existing client relationships or grow your firm by acquiring new clients; consistency is key.

In order to execute a campaign it takes resources, primarily your time, which you need to dedicate to serving your clients. Save yourself time and stay on track by enrolling in one of these automated. turnkey solutions.

Automated Prospecting Program

Identifying new clients that fit your ideal customer profile is a challenge for every business owner. This program provides a solution that helps you target the individuals and families that best fit your business model.



of American

say they prefer being contacted BY BRANDS VIA DIRECT MAIL

> because they can read it whenever they want¹





Increasing client retention rates by 5% can increase profits by **25-95**%

Let's Talk Financial Wellness®

A bi-monthly newsletter program that allows you to deliver targeted content through the multiple available versions; Insurance/Legacy Planning, Retirement Planning, Small Business Needs, and Standard Financial Concepts.



12-Month Marketing Program with Let's Talk Financial Wellness®

An automated multi-channel solution that delivers 18 annual touch points to build and strengthen your client relationships. Each month your clients will receive informative and educational content, and provide them with the opportunity to engage with you, regularly.



¹ Epsilon ²Bain & Company