Selling Financial Services MARKETING Checklist
(for Troy Patton/Coach Patton Members)

Whether you've just completed your tests or have your IAR designation and want to recommit to offering financial services, you need to re/start communicating/advertising that you offer/sell financial services. If you don't, Clients/people will never know and even when you do you can be still thought of as just their 'accountant/CPA' who does their books/taxes. Here is a Good - Better - Best - Advanced Checklist to get started. **Note that doing ALL of these will garner the best results!** Why? As with any advertising, the more ways you communicate with people over an extended period of time, the higher the response (& more assets you will acquire)!

GOOD - In your next physical meeting or phone call with Clients, you could either:

- ☐ TELL them (1-step) you now offer financial services/investments
- ☐ ASK them (multi-step) about their investments:
    - How are your investments performing?
    - Do you think your portfolio is allocated/positioned correctly if the market corrects/sells off?
    - Would you be interested in an Asset Allocation Check, Risk Number Analysis, Free Portfolio Review, Free 2nd Opinion?

BETTER - Host a LIVE WEBINAR where you cover some aspect of Investments, the Stock Market, Planning for Retirement, Social Security planning. **Repeat quarterly**.

- ☐ Invite (email / mail) clients & any leads to attend.
- ☐ Send reminders to attend, host & record the webinar
- ☐ Post Replay on your website, Linkedin, Facebook, YouTube
- ☐ Take audio of webinar, burn to CD & mail to high net worth Clients
- ☐ Transcribe webinar, print & mail transcript to high net worth Clients
- ☐ Follow up with attendees (who are non-Financial Services clients) by phone, email, mail offering Asset Allocation / Risk Number with a free Portfolio Review/2nd Opinion

BEST - Develop a separate Financial Services presence so people, your business network, current Clients, leads can see & be reminded by 'physical evidence' of your services.

- ☐ Website
- ☐ Business Card
- ☐ Phone Number

(Having a dedicated & separate business identity allows you to also create additional ONLINE properties, listings, citations & backlinks which all contribute to Search Engines being able to find you, your listings and any Social Proof (testimonials, reviews, recommendations, reports) associated with that property or business presence - also know as SEO.

ADVANCED - Publish your own Market Update - An advanced strategy to promoting that you offer or sell financial services is to start 'commenting' on the markets. Because most accountants are too busy with their regular accounting clients I've developed a service where after the markets close on Fridays I create a Market Update EMAIL recapping the week's activity, that is emailed out to your non-financial services Clients and/or Lead lists.

Included in the update for the past week is:

- Graph/Chart of rolling 1-Year Major Indices Performance (DJIA, S&P500, NASDAQ)
- Daily Charts of DJIA, S&P500, NASDAQ Performance
- Friday/Close Levels/Tickers for DJIA, S&P500, NASDAQ
- Friday Sector Summary Percentages for Energy, Financial, Technology, Utilities, etc.
- Narrative on overall performance for the week for the Market, Major Indices (DJIA, S&P500, NASDAQ) and market related events & reports that drive or impact the indices (ex: Fed meeting, Interest Rates, Jobs Report, Unemployment %, GDP Growth, etc.).
- BANNER AD that links back to your website on Landing Page offering a Free Portfolio Review

Interested in Own Weekly Market Update Emailed to Clients & Leads?

- **$130/month = 4 or 5 emails per month**
- Can use your existing iContact email platform or I'll set one up for you
- Typically send after the market closes on Friday (48 hour max turnaround)
- Can use your or create a custom banner ad and link back to your 'financial services' webpage
- **Contact me for Mock Up / Sample Newsletter**

Jeff Bell | 317-674-3335
jeffbell@mynewcpa.com
www.mynewcpa.com
www.linkedin.com/in/jeffbellmarketingdoctor/