

Build Your Brand



Wealthcare gives you the tools to grow effectively.

WEALTHCAREGDX®
BE A PART OF THE EXPERIENCE



Build A
Strong
Brand
Identity



What's
Your
Plan



Polish
The
Pitch



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Marketing

With Wealthcare, advisors are equipped and empowered with the tools they need to build their market footprint.

It's time to grow. We'll show you how.



Build a Strong Brand Identity

- Creating Vision and Mission Statements
- Creating and Communicating your Value Prop (30 Second Elevator Pitch)
- How to Write a Professional Bio
- Headshots and Team Photos
- Choosing a Brand Name and Logo
- Choosing Your Brand's Color Palette
- Building a Brand Guide



What's Your Plan

- Index Card Marketing Plan
- Creating a Digital Marketing Strategy
- You Do Have a Website, Don't You?
- What is a Marketing Calendar and Why Should You Have One?
- What Should You Include in Your Calendar



Polish the Pitch

- How to Write A Winning Pitch
- Taglines, Hashtags and Banner Ads



Wealthcare Marketing and Compliance



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How do you stand out in a sea of sameness?

Marketing connects an advisor's past brand to their future brand. For advisors who are looking for a fresh start, the marketing team can execute a full rebrand, including new logos, brand style and messaging. For those that just need to update their materials, the team can deliver targeted, tactical rebranding components, including business cards and stationery.



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Build a Strong Brand Identity



Your brand is what other people say about you when you are not in the room.”

Jeff Bezos, CEO and Founder, Amazon

Your brand identity articulates to the world who you are, what you value, and how you communicate your service standards to potential clients. Your brand identity is the personality of your business. If you don't build your brand, your customers, competitors, and the market will do it for you.

You will be building your brand for **content**. Content gives your business a voice. Your mission and vision statements, bios, and elevator pitch help you articulate that voice and share it with the world.

You will be building your brand for **design**. Design brings your brand identity to life through your logo, color palette, and even the font you choose.



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Creating Vision and Mission Statements



“The road to success is always under construction.”

Lily Tomlin, actress, comedian, writer, singer and producer

Much like a GDX360 plan, vision and mission statements should be viewed as living, breathing documents that will be revisited and revised. Your statements should evolve and grow with your practice. Like our ideal plans, your statements should be both **inspirational** and **aspirational**. If they are too generic or narrow in scope, they may produce mediocre results. **Think big**... maybe bigger than you have ever considered before. Don't worry about practicality for now — what may look impossible could be attained down the road with the right processes, procedures, technologies and the strength of entire Wealthcare team behind you.

A Vision Statement is not a Mission Statement.

Mission statements are designed for the present and should convey to your clients **why your business exists**. Your mission statement should reflect your practice niche. It helps you focus on the steps you need to take now to succeed. A Vision statement is **forward thinking** and **is meant to inspire you** and articulate the direction you want your practice to go. Think five to ten years down the road...where do you want your business to be? Your vision statement should be a **descriptive** and **passionate** sentence or short paragraph that describes the goals and dreams you have for your business.

The Mission Supports the Vision.

✓ **Vision Statements** answer the question, “Where do I see my business going?”

✓ **Mission Statements** describe the steps you are going to take to get there.



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Some examples of Vision and Mission Statements:

Amazon

Vision: To be earth's most customer-centric company; to build a place where people can come to find and discover anything they might want to buy online.

Mission: We strive to offer our customers the lowest possible prices, the best available selection, and the utmost convenience.

Starbucks

Vision: To establish Starbucks as the premier purveyor of the finest coffee in the world while maintaining our uncompromising principles while we grow.

Mission: To inspire and nurture the human spirit – one person, one cup and one neighborhood at a time.

Alzheimer's Association

Vision: A world without Alzheimer's disease.

Mission: To eliminate Alzheimer's disease through the advancement of research; to provide and enhance care and support for all affected, and to reduce the risk of dementia through the promotion of brain health.

Advisor Quick Tip

Here's a good question to think about, from Dan Sullivan of Strategic Coach:

- If you and I were sitting here three years from now, what has to have happened personally and professionally for you to feel good about the progress you've made over those three years?

The answer to this question is neither your vision nor your mission statement, but thinking about this question and exploring what it means to you can certainly contribute to both.



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Tips to keep in mind when developing your Vision Statement:

- Look five to ten years in the future
- Dream big and focus on success
- Use clear, concise language
- Infuse your vision statement with passion and emotion
- Paint a graphic mental picture of the business you want
- Be prepared to commit time and resources to the vision you establish
- Link your core ideology (values and purpose) with your envisioned future



Tips to keep in mind when developing your Mission Statement:

- Ask yourself why your company or practice exists
- Choose your words wisely and use terms that are easily understood
- Align your actions with your vision
- Describe who you are, what you do and what sets you apart
- Be passionate and give your mission statement a sense of conviction and commitment
- Be grounded in the fundamentals of your business



Mission Statement Framework:

- My service is.....
- I provide.....
- For.....
- Who are dissatisfied with.....
- Unlike.....
- I offer.....

Why are Vision and Mission Statement so important to your business?

WORDS HAVE POWER. Well written mission and vision statements can help ensure your efforts, processes, and strengths are aligned with achieving your long-term goals.

Creating and Communicating Your Value Proposition



...when a sentence is made stronger, it usually becomes shorter. Thus, brevity is a by-product of vigor.”

William Strunk

The best elevator pitch doesn't feel like an elevator pitch. It is not meant to seal the deal. It is meant to begin a conversation that interests the audience in having a deeper dialogue. You have a limited time to make a great first impression, sell yourself quickly and efficiently.

It's a primer, a high-level basic introduction given in 30-60 seconds to provide enough information, so they understand the message you are trying to convey but is vague enough info that they want to know more.



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Follow the Rule of 3's

All elevator pitches should identify:

- Who you are
- What you do
- What's in it for them



They should have:

Intro

- My name is
- I am a(n)
- I specialize in

Body

- Identify the pain point
- Provide your solution
- Let them know what makes you different or better

Call to Action

- Should be small and easy to complete in a few seconds
- What do you want them to do (visit your website, set up an appointment, connect on social media)
- **Always have your business card ready to hand out!**

Be Ready to Deliver:

- **Practice** - speed and pitch should be natural
- **Practice** - in front of a mirror, in the car, to a family member, co-worker or friend
- **Practice** - be flexible. Know your audience and be able to adjust if necessary

Advisor Quick Tip

- There are certain big questions people will always ask **during or after** your pitch.
- Anticipate the questions and have answers to those key questions ready and practiced.

How to Write a Professional Bio

You only have one chance to make a great first impression, that is why your bio is one of your most vital marketing pieces. It should be a well-written, authoritative, and positive reflection of your professional achievements and status.

Know your audience. What do they need to know about you?



Used in a generic bio

- Current position
- Career highlights
- Professional designations and education



Used in marketing pieces when appropriate

- What services you offer
- How you can make a client's life better
- How you provide "Financial Guidance for Life"
- What you want them to do (your call to action)
- Optional Tags (wrap-ups of choice like personal information or career objectives)

Advisor Quick Tip

- Using a bit of humor in your bio is not only acceptable, it's recommended. It brings a human touch to an otherwise one-dimensional piece of written copy. Just as important, don't short-change your accomplishments for the sake of being funny. Find a balance.



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Where to Use a Professional Bio

- Websites
- Social Media Accounts (Twitter, Instagram, Facebook)
- LinkedIn Summary
- Speaker Sheets
- 'Meet our Team' or 'About us' page
- Flyers, Brochures, E-Newsletters
- Press Releases

Advisor Quick Tip

In marketing, a **call to action** (CTA) is an instruction to the audience designed to provoke an immediate response, usually using an imperative verb such as “call now”, “find out more” or “visit a store today”. [https://en.m.wikipedia.org/wiki/Call_to_action_\(marketing\)](https://en.m.wikipedia.org/wiki/Call_to_action_(marketing))



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Write multiple versions: People have short attention spans. Keep it tight, cut out unnecessary text, and only share as much as necessary to tell your story.

Social Media (Facebook, Twitter, Instagram, Blog)

- Create a micro bio: 2-3 short sentences
- 155 characters or less
- Include @tags, your unique #tags, website URL

Personal Summary (Website, LinkedIn)

- More thorough and comprehensive
- 2,000 characters / 2-3 short paragraphs
- Write a story, not a list. Tell them who you are and what you are about.

Not only will you want multiple size versions, but you will also want to tell your story from multiple points of view. If your bio is to appear on our company page or you are being introduced by someone, it makes sense to use the third person (your full name). For a client-facing advisor brochure or for your social media, it is better to use the first person.

Advisor Quick Tip

- Why have more than one version? From a Search Engine Optimization (SEO) perspective, unique content helps your profiles and websites rank better in search results.





Social Media Bio Template:

Your Name is a Professional Title in City on a mission to What You Do.
You can Call to Action (ex. find more about) him/her at Website Address.

Professional Bio Template:

Your Name is a Professional Title with Company/DBA in City (or save for personal section) since Year. He/She helps Your Target Audience with Problem you Solve or Goal of your Target Audience.

His/Her practice focuses on List Strengths and Beliefs (What makes you unique and sets you apart from other FA's). He/She is motivated by the value you bring to your client relationships.

List at least one Professional Accomplishment and any professional distinctions. His/Her concentration is on Niche Market.

Your Name enjoys Hobby 1 and Hobby 2 (ex. spending time with family, golfing, volunteering)

Your Name is available for Call to Action (let them know how to engage with you). You can reach Name at Link (to allow them to connect immediately). Hyperlink to other bio sites.

Having trouble describing yourself? Look back at your resume for ideas.



Advisor Quick Tip

Trying to discover your point of differentiation?
Finish this sentence:
Only I (We)...



Headshot & Team Photos



“You never get a second chance to make a first impression.”

Will Rogers



Tips for a great professional headshot:

- Go Pro. It's worth the money. A good photographer knows what positions, lighting, and background to use to get the best shot possible.
- Every social media site requires a photo and uses visual marketing to connect people with prospects. A great first impression is a lasting one.
- Match it to your personality or brand. If you meet your clients in a suit and tie, wear a suit and tie in your headshot. If your office is a bit more casual, you can have a bit more fun with your headshot.
- It should be current. It should look like who you are now, wrinkles and all.
- Have good posture. Chest up with good lighting on your face.
- Wear solid colors that flatter your skin tone. If you are wearing a suit, wear a dark one (charcoal grey, one with texture), with a white shirt and a brightly colored tie or if you are going open collar/no tie, wear blue. Ladies, bring at least 3 to 4 clothing changes. Make sure your clothes fit well and are not wrinkled.
- A lot can be done with touch-up. Go for basic hair and minimal neutral make-up. Keep jewelry to a minimum.

Advisor Quick Tip

- **Need a Meet the Team photo?** Makes sure heads are on different levels. Go for uneven footing (stairs) or have some sitting and standing.



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Choosing a Brand Name and Logo

The name and logo you choose is as important as the services you provide. The brand you choose will leave a lasting impression in a prospect's mind even before they decide to do business with you.

What do you want your image to convey? Is there a story you want to tell? People will ask you the meaning behind your name (logo) so it should mean enough to you that you would want to tell them.

Brainstorm names for your business and capture every name you consider. Even if a name seems unsuitable, you may end up using part of it when you narrow down your list.

Create a mood board. Collect images that inspire you, have qualities or values that your business is built around or reflect something that is important to you.



Make a list of:

- Historical, Geographical or Natural Landmarks in your area (i.e.....Water Street, Colonial, Two Rivers, Bay Area, Magnolia)
- Niche Markets (Wealthcare for Women)
- Descriptive words (Prudent, Prosperity, Insight, Valor, Integrity)
- Your Name (Owenby Jones)



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5 Criteria for a Great Brand Name

- **Be Concise** - Choose a Short Name
- **Be Easy to Spell** - you want people to successfully search for you (flickr)
- **Be Memorable** - humans are terrible at remembering names. You hear it and then forget it. An unforgettable brand name should challenge the mind's easy-in/easy-out tendency.
- **Be Clear** - make the business you are in and the service you provide obvious
- **Be Unique** - you are one of a kind. Let your logo show how you stand out.

Advisor Quick Tip

- Write it down. Say it out loud. Ask friends and family to make sure your name doesn't trigger negative emotions or have adverse reactions.



Once you have narrowed down your choices make sure that:

- the domain name is available
- it meets SEO standards (the easier it is for prospects and Google to search, the better....no weird spelling)
- is visually appealing when written down
- search the federal database of the US Patent Trademark office
<https://www.uspto.gov/trademark>
- Register it. If you have an LLC or sole proprietor choosing to do business under that DBA you will need to register your business with your state authorities.



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Don't design for brands. Design for people interacting with brands.”

creativesummerstudio.com

Choosing the Perfect Logo

A logo is a direct representation of your brand. How many companies can you recognize by just their logo alone?



- Now that you have your name, is there a logical image that goes with it (River/Water, Street Sign, Flower, Tree)?
- Passive or active is not only for investments. An active logo instills motion or a sense of activity (i.e.... a bird in flight, an arrow pointing forward or up).
- Keep it simple. Blow it up, shrink it down. Make sure you can resize your logo without compromising the quality.
- Experiment with design configuration (horizontal, vertical, stacked, with a tagline)
- Use color with care (see color palette section for help selecting colors). Designs do not always translate well to grayscale. Test your design in a single color and black and white.
- Font, Custom, or Letter Based (IBM, eBay, Coca-Cola)? With an Illustration or Abstract Design (Apple, BP, Pepsi)? A combination of both (Burger King, KFC, McDonalds, PUMA)?



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Save your logo in the following formats:

- **JPG format:** Best for print purposes like letterheads and brochures
- **PNG format:** Best for online purposes like social media and websites
- **SVG format:** Best for websites, web apps, and responsive interfaces
- **TIFF format:** A high-quality uncompressed file best for print designs.
- **Adobe Illustrator (AI) format:** A customizable vector file of the design.
- **EPS format:** Editable vector file that works with multiple vector editing apps.

Advisor Quick Tip

- Think about all the marketing material it will be used on. How will it look in print (business card, letterhead, envelope), digitally (website, social media, and on promotional items (shirt, hat, pen)?



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Choosing your Brand's Color Palette

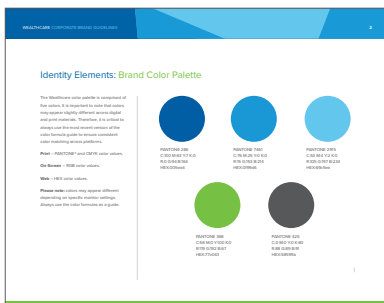


Color transmits and translates emotions.”

Wassily Kandinsky

Why do many banks and financial institutions (much like Wealthcare) use blue as their main color? Because colors have an emotional association. They use blue

because it stands for professionalism, security, formality, loyalty, tranquility, trust, openness....all traits you would want from a company that manages your money.



For your business style guide, plan on choosing at least three colors. A base color, an accent and a neutral color. Wealthcare's brand is comprised of five colors.



- **Print** – PANTONE® (PMS) and CMYK color values (Cyan, Magenta, Yellow, Black)
- **On-Screen** – RGB color values (Red, Green, Blue)
- **Web** – HEX color values (Hexadecimal)

Advisor Quick Tip

- A logo that will be mostly used in print design should be designed using CMYK colors. And
- a logo for a web app can be crafted in SVG format for better scalability.

How do I add my custom color theme to GDX360?

You can brand your advisor site (and the client portal) by going to: Preferences Tab > Advisor Branding > Color Picker.

[Click here](#) for the GDX360 Advisor Site Branding instructions.



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Brand Guide

Having a Brand Guide (also known as a brand book) provides direction for implementing your marketing strategy. Everything a marketing team would need to know about communicating your message, keeping that message consistent, and bringing your brand to life is contained in this guide.

Now that you have your name, vision statement, bio, headshot, logo and color palette, it is time to put it altogether in one simple to understand Brand Guide. This guide should contain sections on both:

- Your brand guide for design (logo, color palette, fonts)
- Your brand guide for content - your business' voice (mission and vision statement, bio, elevator pitch, taglines)

Use our [Brand Guideline Template](#) to build your own custom guide.

Advisor Quick Tip

- **Consistency is Key** - If your branding and messaging are all over the place, your audience will have a difficult time following your story.



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What's Your Plan?



By failing to plan you are planning to fail”

Benjamin Franklin

Marketing is an important component of any business. It helps you sell yourself as an advisor and allows you to actively promote the services you provide.

A good marketing plan can be the catalyst to the success and growth of your practice. Having a structured plan gives you control, allows you to focus your resources, (both money and time) and can keep you organized and on track in your marketing efforts.



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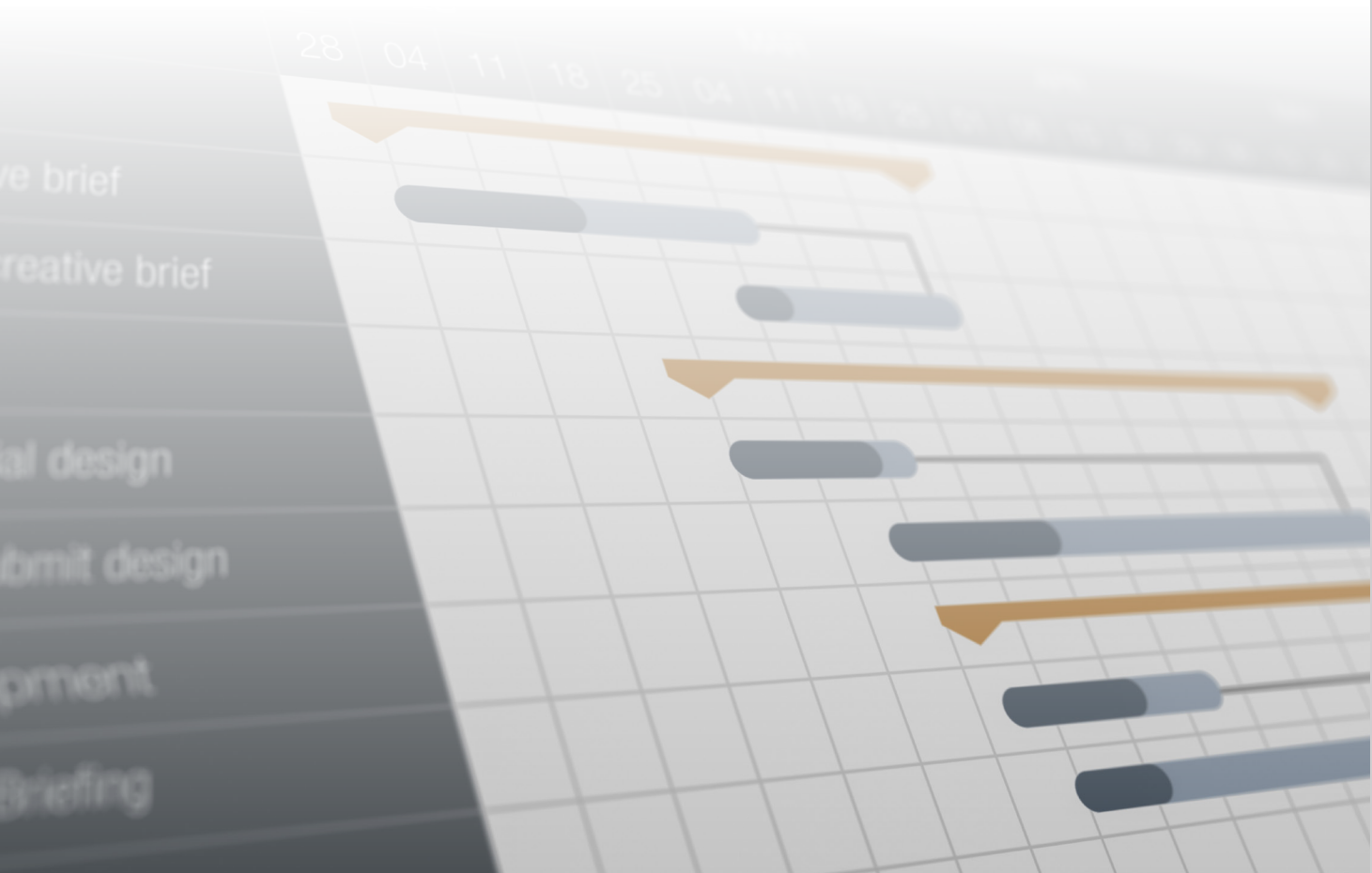
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Index Card Marketing Plan

The most detailed and organized business/marketing plan is useless if it isn't being referenced or utilized often. Plans should be pared down to the bare minimum until they reflect only the most critical elements of their overall strategy. They should be well defined with the methods you intend to use to meet your goals and give you the flexibility in your schedule, so you can respond to new business opportunities when they appear.

Plans are guides and are not to be created as a static document. They should be concise enough to fit on a 3x5 or 4x6 index card. **Keep your plan where it is visible as a daily reminder of your actionable goals and tasks.**

Build or re-evaluate a manageable business/marketing plan by:



Reviewing the past

- If you already established goals, did you accomplish them; if not, why?
 - Was it the goal?
 - Was it your work ethic?



Accessing the present

- Embrace your passion
 - What do you do best and enjoy most?
 - Can you do those things more and delegate the things you don't enjoy?



Designing the future: short and long-term goal setting (include SMART goals from the [Practice Management Guide](#))

- The next week
- This month
- This year



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Creating an action plan.

- What actually needs to be done to produce results
- Set smaller, manageable and more frequent goals



Schedule accountability meetings with yourself. Monitoring your growth is critical.

- Activity (calls, meetings, campaigns)
- Results (new clients, revenue, AUM)



What are the 1-2 activities you need to focus on daily that will lead to the results you want?

- Write these down and share them with your team.
- Create accountability around these activities
- Review activities vs results at least quarterly and adjust as necessary

Advisor Quick Tip

- Want to learn more about simplifying your strategy and magnifying your results....try Brian Margolis' book "The Index Card Business Plan for Sales Professionals and Entrepreneurs"



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Creating a Digital Marketing Strategy



“ We don’t have a choice on whether WE do social media, the question is how well do we do it.”

Erik Qualman

It’s a safe bet that a new prospect is going to google you before they engage with you professionally. Your social media profiles are “very searchable” and along with your website will likely be one of the sites that your prospect uses to vet you and grow their confidence in your services. Today’s successful advisors use social media to network, prospect and build brand awareness. They stay active. The more active you are on social media networks, the higher you will rank in search engine results.

Putnam Social Advisor Survey 2017

The fifth edition of Putnam’s Social Advisor survey was conducted in November 2017 and polled 1,014 financial advisors from across the United States. They found that both newer and top-tier advisors are benefiting from an active and robust social presence.

- **86%** of advisors report gaining business from social media
- **60%** of advisors say social media is a great deal more efficient than traditional networking
- **88%** of advisors say social media has changed their relationship with their clients
- **LinkedIn** remains the overwhelming choice for business and is still a critical tool for advisors, but advisors are more active on **Facebook**
- **Female** advisors are **more active** on social media and are **reporting greater success** as measured by gaining new clients

Overall, social media usage by advisors is becoming the norm and successful advisors are clearly approaching social media with a plan. To learn more about Putnam’s findings, [click here](#) to view their full report.



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Advisor Quick Tip

Make a Commitment to Social Media. Create a plan and write it down. Develop a social media strategy that aligns with your goals and define your metrics for success. Don't just jump into social media without a specific reason and an objective that you are trying to accomplish. Think about how it can help with customer retention, brand awareness, lead generation and sales, then take the necessary actions.

LinkedIn Tips and Tricks

- Use a **professional/business headshot** that is either formal or business casual and is 450X450 pixels (can be zoomed in on)
- Make sure you **include all important contact information** (phone number, email, other social media URL's including your website)
- **Personalize your LinkedIn address** to improve SEO. When you first create a LinkedIn profile, the site will automatically generate a generic web address for your page. It is best to edit this URL to include your name, your name plus your title, or your name plus your certification. Below are a few samples:
- <http://linkedin.com/in/YourName> [YourNameFinancialAdvisor](http://linkedin.com/in/YourNameFinancialAdvisor) [YourNameCFP](http://linkedin.com/in/YourNameCFP)
- Create an **informative and compelling headline** (you are allowed 120 characters). Include not only your job title but also your area of knowledge or expertise (what you do, not just your title).
- Give your profile an informal feel by **writing in a first-person voice** to keep the tone conversational and lively. Include credibility factors such as experience, designations, and accomplishments. Also give the reader information they can connect with, like your activity within the community and your profession, your hobbies, and family information.
- **Use your network of connections** (they are probably not all clients) by reaching out to people you haven't connected with for a while. Use the HOME section of LinkedIn to see your connections updates such as work anniversaries, new jobs and titles, profile updates or liked or shared content. These notifications provide you with a great opportunity to connect over something meaningful and relevant. Congratulate them or ask questions to start a conversation.
- When **making changes/updates** to your LinkedIn profile, you may want to consider **turning OFF your LinkedIn notifications**. If you do not, your entire network will be alerted that you have an updated "job title" - which may lead to confusion if you are still in the same role.
- Passion helps generate content. Create content that is important to you. Know who you want to reach (your target audience). What do you want them to learn or feel?



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You do have a website, don't you?

Without a doubt, if you have a business, you should have a website.

If you are only choosing one web presence, websites allow for a much more robust experience for visitors than most other platforms. A website is available to both your regular and potential clients 24/7/365 providing them with the convenience of reviewing your services even when your office is closed.

Most consumers now search for information online prior to making a purchase or selecting a professional to provide them with a service. Even if you've been referred by a friend or their CPA, they'll still likely look you up online before deciding to get in touch.

People moving to a new area often rely solely on the Internet to learn about their new area and where to go for professional services. Most people expect that any professionally run business will have a website. Without one, potential customers will go to your competitors that do. Your website reflects you and your business. A sharply designed website will provide your business with a professional image that inspires even greater confidence.

A website provides education to your clients and prospects. The first step of any business deal is getting the client familiar with who you are and what you are selling. Include articles of interest telling your potential clients about your services. When they call you to discuss your services, half the sale is already done; you've already given them your "pitch".

You may save time (and money) because those who do call are interested, warm (and sometimes hot) prospects, not just someone calling to gather information.



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Advisor Quick Tip

Google Analytics is a web analytics service offered by Google that tracks and reports website traffic. Sign up for Google Analytics by visiting www.google.com/analytics/ or sign into Google Analytics with your Google username and password. Click on “Access Analytics” or click on “Create an account now” if you do not have a Google account. Once signed in, you’ll need to connect Google Analytics to your website to begin collecting data about your traffic and visitors.

Think of your website as being your online brochure.

It is easy and quick to update information about your services on your website, making it an effective way of letting your customers know about the arrival of new products, upcoming events, special promotions, or any new services you offer. Unlike print ads which can become outdated, your website can provide current information and news.

Wealthcare offers our advisors a free, personalized website template that highlights the power of our GDX360 approach. This can be your only site or can be added as a link to your current site.

You will have to cover the cost of adding basic personalization (name, biography, headshot and contact info) and further customization is available by TorxMedia at an hourly fee. Please email marketing@wealthcarecapital.com if you have any questions or are interested in creating a Wealthcare complied website.

Advisor Quick Tip

Add your web address to your stationery and business cards and you’ll have prospects knowing exactly where to go for answers to their questions and where to send their friends to for a great experience. Be sure to include it in your email signature.



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What is a Marketing Calendar and Why You Should Have One?

Marketing keeps you in the forefront of your existing clients mind and helps you recruit new ones. It's incredibly important to the success of a business but marketing your business takes work. The more organized you are, the easier that work becomes.

Before deciding how you are going to market to potential clients, you need to decide what type of prospect you will be marketing to. If you haven't defined your target client or uncovered your specific niche, use the Niche Marketing section in our [Practice Management Suite](#) to narrow the field of prospects down. Having a target market/client and a specific niche doesn't mean that you will exclude potential customers that do not fit into those personas, what it allows you to do is focus your marketing dollars or resources on a specific market that is more likely to do business with you. You have identified your best clients now how do you get in front of more people like them?

- Market to a particular employer (host a company social event or a lunch and learn)
- Generate leads by purchasing lists from associations your group belongs to (i.e....Virginia Dental Association)
- Let your current clients know that you are interested in working with clients who are similar to them. Ask for introductions to friends and colleagues

Before creating your calendar use Index Card Marketing Plan in the previous sections to zero in on your overall marketing strategy. Once you have your strategy use our [WEALTHCAREGDX Annual Marketing Calendar](#) to break your plan into manageable and scheduled activities.

A well-maintained marketing calendar provides a clear overview and understanding of what and when marketing activities should occur. It helps you spot gaps and keeps you from veering off-track.



Build A
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Identity



What's
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What Should You Include in Your Marketing Calendar

Blogs

What organizations serve your niche? Perhaps you can contact them and explore writing opportunities.

Letters

Client Surveys
Quarterly Newsletter
End of the Year Thank You

Calls

Birthdays
(Social Media and Email too)
Anniversaries
(Social Media and Email too)

Email Marketing

Client Nurturing Campaign (CNC) - Send your email list to our marketing team and have them send out emails on your behalf 2X a month

White Papers

Check the client facing section of the resource tab often as new whitepapers are always being added by our team

Social Media

Use social media to connect with your niche (join LinkedIn Groups that they belong to and post relevant content)

Events

Partner with a common Center of Influence (establish a mutually beneficial relationship)

What organizations serve your niche? Contact them and explore writing or speaking opportunities.

Attend or sponsor charity events that are important to your target market.

Participate in community events that are attended by your target market (targeting women - join a women's golf league or through meetup.com).

Advisor Quick Tip

Review often for successes and failures and adjust accordingly (add a grading system like 1-10 or A, B, C, D)

Add in a budget section/column (you will not only be able to track the cost but also the ROI for your efforts)

Track peak demand or response times so you can adjust your plan the following year (were more emails opened by your clients on a Sunday vs during the week or was there a better response time if they were sent at lunch or in the evening)

Keep your messaging consistent (inconsistent brand messaging leads to confusion and lack of trust among clients)

Stick with it (if you start a campaign, make sure you finish it)



Build A Strong Brand Identity



What's Your Plan



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“If you can’t explain it simply, you don’t understand it well enough.”

Albert Einstein

What is a marketing pitch?

For an advisor, it is an attempt to persuade a prospect to believe and buy the solution you’re offering.

Advertisements grab interest in one minute or less, so think about your personal value and how you can present that to prospective clients or even colleagues who can, in turn, recommend you to clients.

That offer might be the chance at another meeting, information on your product or service, or a personal pitch all about you. Whatever the subject matter, it should be quick, to the point, and attention-grabbing.



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How to Write a Winning Pitch

Educating prospects on what you have to offer them is central to a winning pitch. Your prospects don't care about you. They care about themselves, what you can do for them, and the problems you can solve. Your pitch should tell a story so keep it conversational.



Know

- Who you are writing for
- What they want to hear
- How it will drive your business goals



Know

- The Problem + Your Solution
- Add Data if you have it
- A Call to Action

Write for the Reader Who Scans

Create a Value List

Write down every benefit you offer. Remember clients care about themselves. List all the ways they would be better off if they worked with you.

Tell a Story

If you didn't already write your 30-Second Elevator pitch in Step 1, take time now to create one. If you did, you have already completed step 2.

Gather Data Points

Data **shows not tells** how and why you have been successful in solving problems for your clients. Use trustworthy and specific statistics. Having data to back up your story shows the information you are providing is credible.

Advisor Quick Tip

79% of readers only scan and look for words or phrases. Be sure to use:

- bold text and bullet points
- keep it clear and concise
- choose words that are three-syllables or less.
- add only the “need to knows”, not the “nice to knows”



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Turning your pitch ideas into effective copy

Look at your value list, data points, and elevator story...are there are any words or phrases that appear in two or more? Circle them. Now write them down as complete sentences. You should end up with three to six benefits.

Headline

Choose the one that at first glance seems the most compelling. Use this to create the first draft of your headline. The headline should be a four-to ten-word summary written in boldface text. It is intended to grab attention. Don't get stuck trying to perfect this first draft, as you create the rest of the copy, the headline may change...and that's OK.

Example: Do you know when it's wise to stay in your financial Comfort Zone®?

Advisor Quick Tip

⋮ Questions often make good headlines.



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Sub-Headline

The sub-headline explains the headline in further detail. It is meant to provide the reader with a bit more information to entice them to keep reading.

Example: We're told to leave our comfort zones—that they're too boring... too safe. When it comes to financial security, it's wise to stay in your Comfort Zone®—avoiding financial uncertainty and finding the right balance between your investments and your life goals.

Main Copy

The main copy should communicate the benefits you provide and what sets you apart from other advisors, this is the section where you convince your prospect to buy the solution you're offering.

Example: With PlanIt!, Wealthcare's state-of-the-art online tool, you can calculate what your Comfort Zone® should be, and how to get there. PlanIt! is interactive and takes just minutes. It sets you on the right course and can make all the difference for living comfortably in your retirement.

Call To Action (Contact Information)

A call to action is a statement designed to get an immediate response from your reader.

Example: Talk with your Wealthcare advisor about PlanIt! and how to get in the zone.

Adding Logo / Images

Adding images to your pitch can help bring your message to life. Images grab attention. When a reader looks at your piece, the image is the first thing they look at. Every image should reflect your brand so don't stray too far from your colors, values and original logo.

Example:



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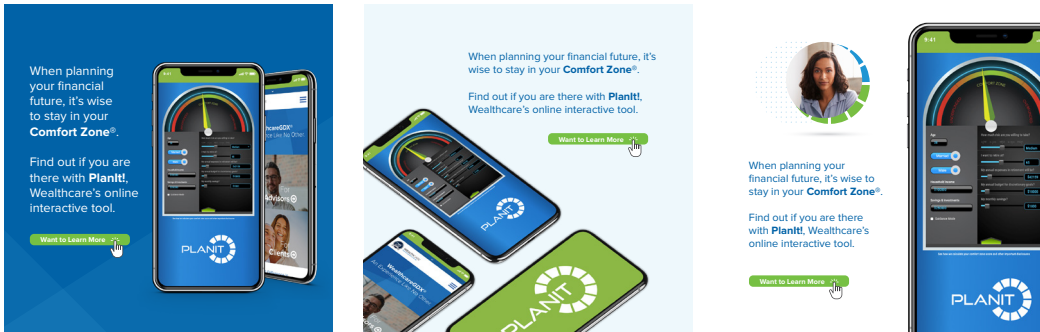


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Converting Copy to use with Different Media Types

The copy you use for a print ad will be different than what you would use in a social media post. Start with copy you would write for a website or print ad and begin paring down to match copy with the correct audience/channel. Here is an example of how we took the full copy for a Client Facing PlanIt pitch and converted it to various other media pitches.

Digital Posts + Display Advertisements



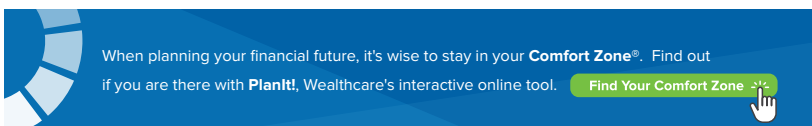
Client-Facing Pitch (1/4 Page Ad)



Email Signatures



Banner/Web Advertisements



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Wealthcare Marketing



Here's How Our Marketing Team Can Help

Marketing guides advisors in building their brand and telling a compelling story.

Looking for a fresh start? Our marketing team can assist with a full rebrand, including new logos, brand style and messaging.

If you're looking to add to your current materials, we can deliver tactical pieces, including marketing pitches, client-facing content, email campaigns, and custom branded promotional material.

Either way, our marketing team provides professional, creative services that help you build your brand and a marketing strategy.



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Our marketing team already has a suite of high-quality, client-facing marketing collateral that can be co-branded with your logo, colors and business information. This suite includes videos, brochures, powerpoints and one pagers that can aid you in delivering the Wealthcare message.

You can find these pieces in the Resources Tab in [GDX360](#) or on our [Marketing Page](#).

Didn't find what you were looking for? Wealthcare Marketing is here to help. We work closely with a team of independent Copywriters, Web Designers, Graphic Designers, and Print Vendors, who are all familiar with the Wealthcare brand and messaging to help you create smart and engaging marketing pieces and packages.

We can help you with:

- A re-brand (new logo design, stationary, business card, etc)
- Co-branding of Wealthcare collateral
- Advisor template brochure
- Client Nurturing Campaigns
- Client emails
- Website development
- Social Media Campaigns
- Marketing pitches
- Client-facing print collateral

The cost of services listed above varies based on the scope of the project and the resources necessary to complete. All services are charged using an hourly fee starting at \$125/hr.

Submit all marketing requests to marketing@wealthcarecapital.com.



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Compliance

All material that is shared with more than one client is considered an advertisement and needs to be reviewed by compliance prior to use.

We can help you with:

- Brochures and Illustrations
- Circulars, Newsletters or Fliers
- Statement Inserts
- Office Signage
- Group Email, Quarterly Emails/Commentary, Client Education Emails
- Prospecting or Direct-Mail communications
- Newspaper Articles and Advertisements
- Telemarketing Scripts
- Form Letters
- Audiovisual communications (audiotapes, videotapes, slides, overheads, etc.)
- Seminar/Event materials, including materials of general interest, intended to educate attendees about basic financial concepts
- Generic financial and insurance products
- Sales Presentation materials (general and non-product specific) used to develop interest in financial planning concepts or insurance products
- Business Listings
- Reprints of third-party articles or reports
- Business cards, letterhead, email signatures
- Radio or TV commercials
- Internet, websites, and all other forms of electronic or social media, including chat rooms, bulletin boards, blog posts and instant messaging
- Sales scripts (face-to-face, visual, audio or email)
- Software Illustrations



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Stationery must meet the following requirements:

- Prominently disclose applicable RIA/broker-dealer disclosure.
- When including a telephone number, you must include a telephone number that rings into the registered office location.
- Email signatures must also include additional disclosure.
- While two-sided business cards are permissible, care must be taken to determine that the disclosure is prominent
- Place the website and email address on the back of the card along with the disclosure.
- The font size should be reasonable based on the font sizes used on the front of the card and the amount of information included on the back.
- Logo, name and title should appear on the front side of the card.



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Stationery includes, but is not limited to the following:

- Letterhead
- Half sheets / Note Pads
- Business Cards / Digital Business Cards
- Email Signatures
- Envelopes (including Return Envelopes)
- Fax Cover Sheets
- Note Cards
- Shipping labels
- Labels
- Masthead

Client Testimonials are not permitted.

All claims should be truthful and must be able to be substantiated. Avoid using absolutes in phrasing including all, always, best, etc.

All graphs, charts and formulas must be properly disclosed.

Prohibited from presenting past specific recommendations that are not complete and objective (cherry picking)

Questions as to whether material is communication with the public and any material for compliance approval should be directed to **compliance@wealthcarecapital.com**



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Build your brand. **Make an impact.**

P 877.883.7526 www.wealthcaregdx.com



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