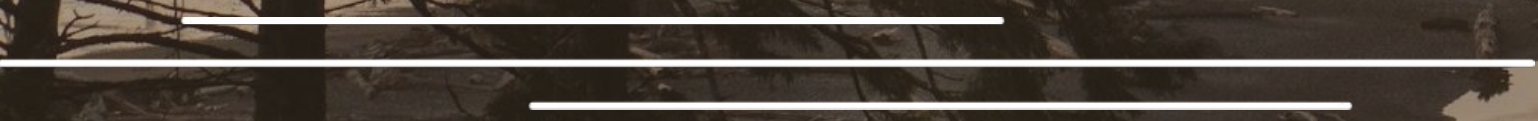




elkhorn
MARKETING GROUP



Marketing Playbook



Memorable Experience



Segmentation Is Your Compass



Winning Game Plan on Social Media



First Impressions Matter



Social Experiences Elevate



Leverage Philanthropy



Be Memorable

We won't outspend, we will outsmart

Birthday video messages

Gifting: Onboarding & A Clients

Social media spotlights

Spousal alignment (planning & legacy)



Pink & Blue Questions

Name _____

Date 6/18/15

1. At what age do you want to be financially independent (*retire*)? 65
2. What monthly income (*today's dollars*) do you desire during retirement? 11K-12K
3. My concerns right now – Please rate each topic below on a scale of 1-10

7-8

In Name _____

Date 6/18/15

7-8

0

6

0

0

1

7

0

0

7-8

1. At what age do you want to be financially independent (*retire*)? 60
2. What monthly income (*today's dollars*) do you desire during retirement? 5K
3. My concerns right now – Please rate each topic below on a scale of 1-10

(10 = Keeps me awake at night; 1 = No concerns)

- 5 Implementing a retirement savings strategy
- 8 Investing strategically in today's environment
- 1 Reducing debt
- 7 Exploring tax diversification strategies
- 8 Protecting family in the event of premature death or disability
- 5 Funding education for kids or grandkids
- 8 Developing a retirement income strategy (e.g. Social Security, pensions, annuities)
- 7 Understanding the impact of rising health care costs
- 3 Educating financially savvy kids
- 1 Caring for aging parents
- 7 Transferring wealth efficiently to the following generation(s)

Legacy Alignment

Name _____ Date _____

1. What's the number one charity or nonprofit you are passionate about? _____
2. How many charities do you donate to per year? _____
3. How much do you donate to nonprofits annually? _____
4. My concerns right now - Please rate each topic below on a scale of 1-5
(5 = Keeps me awake at night; 1 = no concerns)

- _____ Philanthropy is clearly defined in my estate plan
- _____ Dedicating time to think about our family legacy
- _____ Working with our kids on next generation giving
- _____ Becoming more actively involved with charity organizations
- _____ Creating a donor advised fund or private foundation

Name _____ Date _____

1. What's the number one charity or nonprofit you are passionate about? _____
2. How many charities do you donate to per year? _____
3. How much do you donate to nonprofits annually? _____
4. My concerns right now - Please rate each topic below on a scale of 1-5
(5 = Keeps me awake at night; 1 = no concerns)

- _____ Philanthropy is clearly defined in my estate plan
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- _____ Becoming more actively involved with charity organizations
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THE ADVISOR OF THE FUTURE

Website SEO becomes AIO

Artificial Intelligence Optimization

1. Google Reviews/Testimonials
2. FAQ Pages
3. Business social media accounts
4. About You
 - a. Community
 - b. Core Values
 - c. Culture

Every Firm Should Have

First Impressions Deck

- “Why” behind the firm
- Your values
- Humanization
- Your process

Onboarding Deck


- Introduce your team
- What you need from the client
- Firm expectations



MEET YOUR TEAM





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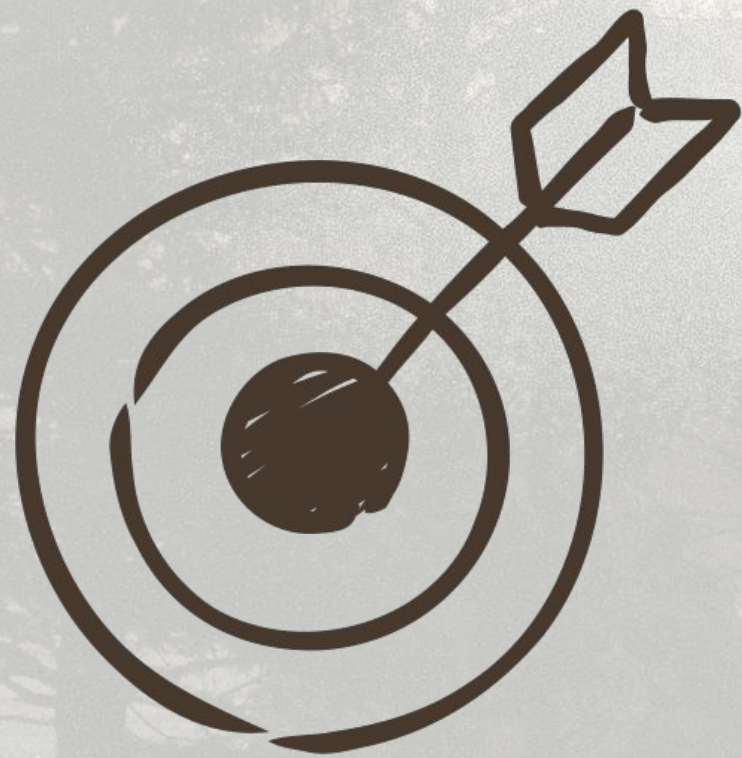
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Segmentation

Your clients are your competitors' #1 prospects



80/20 Rule

Invest time where it matters

Your best marketing plan starts with your A Clients

**How many HHs is the right #
for each segment?**

A Clients

75-100

B Clients

200-260

C Clients

remaining

Considerations

What Determines A-B-C Segmentation

Example:

A client: >\$10k premium + >\$500k AUM

B client: \$5k-\$9,999 premium + \$250k-\$499k AUM

Is your team aligned when onboarding; which segment does each new client fall into?

**Risk &
Investments**

Referability

**Renewal
Revenue**

**Income or
Opportunity**

Gold Standard Touchpoint for A Clients

- Offer 2 personalized annual reviews
- 1 technology review
- Personalized birthday message – phone video for efficiency
- Invited to Board of Advisors
- Connected to you on social media – LinkedIn
 - Organic growth to business profiles
- Quarterly newsletter
- Custom gift (wedding anniversary is the most meaningful)
- Social experiences invite (fun, philanthropy, etc.)
- Virtual education (minimum of twice per year)

Why Social Media Matters

- **50%** of investors say social media impacts who they hire as a financial advisor
- **33%** of consumers report that they actively seek out financial advice online
- Showing personal and authentic content makes you more **personable**
- A great prospecting tool: **74%** of US financial advisors on social media initiated new relationships or onboarded new clients

Financial Advisors are subject matter *experts*

Social Media Playbook To Win



Templates of your brand/DBA



Develop content calendar



2 posts per week (personal + thought leadership)



Organic growth



Track growth – impressions, engagements, followers

Recommended Profiles

LINKEDIN

Great for: company wins, team culture, community involvement, recruiting content, industry updates

BUSINESS LINKEDIN

Great for: team member spotlights, community involvement, team culture, industry updates

BUSINESS FACEBOOK

Great for: professional content mixed with hobbies & interests, personal insights, life-stage moments

BUSINESS INSTAGRAM

Great for: imagery, realtime moments, Instagram stories, short reels, mix of professional & personal



GSG Wealth Management 420 followers
1w • Edited • 🌐

Exciting News at GSG Wealth Management! 🎉 We're thrilled to announce Alex Seward, CFP®, RICP® as our newest partner. His leadership, expertise, character, and dedication have been and will be invaluable for our team and clients for years to come. Dive into the latest edition of the Evansville Business Journal to learn more about his journey and our growing firm.

<https://lnkd.in/gTtUspVg>

Congratulations
on being promoted to Partner!



Alex Seward

48 11 comments • 2 reposts

William R Hayes, CFP, ChFC, CLU... 2nd + Follow
Financial Advisor in Ponte Vedra Beach, FL
1w • 🌐

Happy to be in Aggieland on this beautiful game day to see the Aggies play the Gators.

Come by our tailgate tent in Aggie Park (Site A52) if you are on campus in College Station today!



Sarah Scharpenburg and 60 others 10 comments

Sentinel Advisory Group 190 followers
2mo • Edited • 🌐

Happy Work Anniversary, **Natalie Burgess, CLF!**

Since joining Sentinel Advisory Group, Natalie has brought heart, energy, and exceptional communication skills to everything she does. With a background in language 🗣️ and a lifelong passion for connection, Natalie has a gift for making people feel seen, heard, and supported, a true asset to our team and the clients we serve. Natalie brings her full self to the workplace every day. Her curiosity, creativity, and care make a lasting impact and we're so lucky to have her on our team. 🎉

Thank you, Natalie, for all that you do!

#WorkAnniversary #SentinelAdvisoryGroup #MadisonWI #FinancialGoals

HAPPY WORK ANNIVERSARY

Natalie Burgess
DIRECTOR OF OPERATIONS



SENTINEL ADVISORY GROUP

You and 21 others 1 comment

▶️ **9x** more engagement when content is personalized

The Why

Connecting with an advisor or team in a social setting **builds trust**

Wealth Management firms today that have a social and a business relationship receive **twice** as many referrals as those with purely a business relationship

The data shows that the success when scheduling prospect meetings **triples** when it's after a social experience vs a referral ask

Mindset Client + Prospect = **Game Changer**



Event Format Considerations

- Client appreciation only?
- What does inviting prospects look like?
- Co-investment experience?
- Educational or social?
- Online or in-person?
- Size of experience
- Audience (adults, kids, or female-only)

Social Events

Wine & spirits (ex. whiskey tasting)

Culinary

Sports (ex. viewing party, game access)

Family (ex. movie, pumpkin patch)

Mother's Day

Music

Philanthropy

Darrin Brumbaugh Privately Invites You to a:

EUROPEAN HUNT

AT OAK CREEK SPORTING CLUB

Experience includes a guided, European style pheasant and chukar hunt, and a session on the clay shooting course.

Friday, September 8

9:30 am - 3:00 pm

lunch and beverages provided

2890 W Road, Brainard, NE 68626

Please RSVP to Rachel Petersen at (402) 362-1832 or rachel.a.petersen@nm.com

EVENT DETAILS

9:30am

10:00am - 12:30pm

12:30pm - 1:00pm

1:00pm - 2:30pm

2:30pm - 3:00pm

Arrival at Oak Creek

European hunt

Please provide your own shells: Recommended 3 boxes

Lunch provided by Oak Creek

50 targets on clay course

Shells provided by Oak Creek

Receive birds and departure

Wine Tasting

Hosted by Vince and Alisa Ryan

JOIN US IN TASTING SOME OF THE MOST WELL-KNOWN WINES FROM VARIOUS REGIONS THROUGHOUT THE WORLD! LEARN TIPS & TRICKS TO TASTING WINE LIKE A PROFESSIONAL THROUGH A SOMMELIER-LEAD BLIND TASTING WITH CERTIFIED SOMMELIER, HEATHER SMITH.

FEATURING A WIDE VARIETY OF BOTH WHITE & RED WINES, THIS CLASS WILL HELP YOU DECIPHER ACIDITY, TANNINS, BODY, & TASTING NOTES. PAIRINGS WITH CHARCUTERIE & CHOCOLATE WILL MAKE THE EXPERIENCE EVEN MORE DELECTABLE!

RYAN RESIDENCE

314 Beachwood Dr.
Grand Island, NE 68803

SUNDAY, SEPTEMBER 10

3:00 PM - 5:00 PM

YOU'RE
PRIVATELY
INVITED

WHERE

WHEN



Heather Smith

Renowned, Certified Wine Sommelier

Heather has a decade of high-end restaurant management experience. She has been featured in *Wine Enthusiast Magazine*, *NET Television*, *Nation's Restaurant News*, and *Omaha Magazine*.



Client Feedback

Board of Advisors

Topic: referrals

“I’ve never been asked”

“I don’t understand who they want to work with”

“I need language on how to make the introduction”

“I’m taking risks if the relationship doesn’t work out”

The Guilt Donation

Spotlight on social media



VNA Texas - Meals on Wheels and Hospice
April 6, 2022 · 🌐

Our friends from [Kyle P Wick - 22 One Advisors](#) joined us for a Day of Caring (DOC) recently. We are grateful to your team for spending the morning delivering joy to our Meals on Wheels clients! Want to know more about how your company, group or organization can participate in Day of Caring? Contact Tracie Demery at demeryt@vnatexas.org.



9 likes · 2 comments · 1 share

Like Comment Share

Leveraging a charity event



Wobig Peterson Wealth Management
47 followers
5h · 🌐

Mark and his wife, Nicci, had the opportunity to attend the Guitars & Giving event, an incredible night of music and community dedicated to the fight against childhood cancer. Every dollar raised will go directly to local partners including Blood Cancer United, Team Jack Foundation, Special Spaces, Alex's Lemonade Stand, Sammy Superheroes, and Children's Nebraska. We're grateful to support causes that bring hope and healing to families in our community.

[#GuitarsAndGiving](#) [#ChildhoodCancerAwareness](#) [#CommunityImpact](#)

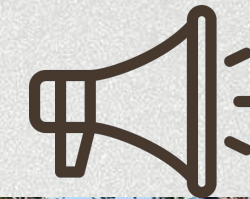


The Guilt Donation

Backlinking to the website



Branding of firm



GSG Wealth Management NORTHWESTERN MUTUAL PRIVATE CLIENT GROUP

HOME ABOUT US TESTIMONIALS OUR PROCESS EXPERTISE RESOURCES CONTACT US

At GSG Wealth Management we see that there is valuable community work to do in Evansville outside of the financial sector. We are thankful to have the opportunity to support the great work that local organizations are doing, by using our time, talents, and treasure. If you are looking for a good organization to support, consider joining us in supporting one of our favorites below:

Our clients are generous!

Since 2020, we have helped our clients efficiently donate over \$2.3 million to impactful non-profits through Donor Advised Funds.

Our Neighborhood

Ronald McDonald House Charities of the Ohio Valley

Daniel Grimm III loves to serve on the Board of Directors for Ronald McDonald House Charities of the Ohio Valley because of their service to parents at some of the most difficult times in their lives, when their children are in the hospital. Their coordination to provide food and a cozy room takes a burden off families when they need it most.

If you are looking for a great way to invest back into your community, consider joining us in supporting the Ronald McDonald House Charities of the Ohio Valley by learning more at <https://rmhcohovalley.org/> or signing up to volunteer at <https://rmhcohovalley.org/volunteer/>.



Full Service Marketing

DESIGN SERVICES

- First Impressions decks & brochures
- Newsletters & other design projects
- Liaison with compliance & materials implementation strategies

SOCIAL MEDIA MANAGEMENT

- Establish social media accounts
- Custom content calendar
- Social graphic design
- Growth strategies

WEBSITE SERVICES

- Optimize site navigation
- Content creation
- Team member updates
- Search engine optimization & keyword targeting

12 month commitment

Marketing Strategies



Specialized Consulting

Executing an effective board
of advisors

Winning with segmentation

Philanthropy strategies

Client gifting

Sales strategy

Social media coaching

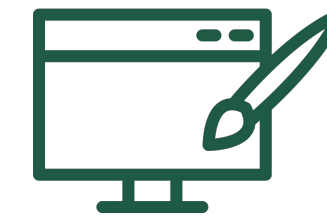
Leveraging wholesaler funds

Core values & mission

DBA brand rollout

Event guidance

Public relations



Design

First Impressions Deck

Capabilities deck &
brochures

Presentation decks

Templates

Custom email newsletter

Website refresh

ELKHORN MARKETING GROUP

BUSINESS THAT ABOUNDS



www.elkhornmarketinggroup.com

