The Advisor/Client Marketing Program

Your Marketing Department in a Box

- Marketing materials
- Strategies
- Live coaching

Marketing Disciplines Covered

✓ Client Prospecting
✓ COI Prospecting
✓ Strategy Sessions
✓ Client Communications
✓ Online Marketing
✓ Referral Marketing
✓ Event Marketing

Get instant access & download 45+ marketing campaigns!

Dear Advisor:

Need to get more disciplined about your marketing? Set up a communications plan? Find a niche? Put a marketing system in place?

Worthy goals…when you have the time...and the staff.

When you don't, check out the **Advisor/Client Marketing Program**. It's like having your very own marketing department with over 45+ proven, professional campaigns to choose from.

Target pre-retirees, CPAs, prospects, and clients with marketing materials, strategies and live coaching that keeps you focused and productive.

Turn the page to see what you could be doing in 2015…

read more… ➡

Welcome to Advisor/Client!

Wendi Webb
Director of Advisor/Client Marketing Programs

Dear Financial Advisor:

Marketing has changed. And it continues to change—probably faster than you can keep up.

But there is one important principle to learn now, that won't change, yet will transform the way you run your business.

Always be marketing.

Yes, back in the day, it was "always be closing." As in make the sale and move on.

These days, you have to market long after the sale to keep clients enthusiastic enough to recommend you to their friends and family. This constant need for referrals – the main driver of new business for most advisors – means you must always be marketing… to your prospects, your COIs, and, especially, your clients.

Constant marketing? Who has the time?

That's why we created the Advisor/Client Marketing Program—a turnkey, flexible and continuous marketing program that can free up hours of your time each week. Here's how it works.

Say you want to send something monthly to your clients, prospects, and COIs. Or you need to get in front of prospects with something substantial. Or you want to remind clients of all the services you offer.

Head to the Advisor/Client website of Horsesmouth, and visit our growing library of 45+ campaigns. There you will find a Monthly Touch campaign—a drip program offering 12 months of educational, expert-written articles that you can email to stay top-of-mind with your target market.

Or you might decide to host a Retirement Income Workshop to target pre-retirees. Or you could send out the "Full Services Referral Letter" showcasing your entire service line in a non-salesy email.

Select the campaign, brand the marketing materials with your picture and personal information, customize the pre-written marketing copy and send. That's just about all it takes to get you in front of clients, prospects, and COIs.

Set-and-forget marketing

Advisor/Client lets you set your marketing on auto-pilot. We have a marketing solution for almost every objective and a boatload of ideas you can use to connect meaningfully with clients and prospects. When you always have to be marketing, it helps to have support.

To your marketing success!

Wendi

P.S. Become a member by Dec. 31st, and avoid the 2015 price increase. You'll save $100.

Visit www.horsesmouth.com/AdvisorClient to learn more.

Advisor/Client: Focused Marketing

Advisor/Client works on three aspects common to all successful practices: prospecting, marketing and client communications.

Advisor/Client helps you build your business in six important ways:

1. Establish marketing systems that deliver proven and effective marketing messages to clients and prospects
2. Plug yourself into a constant flow of timely marketing
3. Build a library of personalized, FINRA-reviewed materials that target clients, prospects, and COIs
4. Create the right messages to ensure a steady flow of new prospects that match your ideal client profile
5. Communicate regularly on timely, topical issues that clients care about
6. Never be at a loss on what to do next!

How It Works

Your Advisor/Client membership is good for one year. Over the course of that year, we will meet for 20+ webinars covering different aspects of financial advisor marketing.

The Advisor/Client program is organized around campaigns designed to achieve different marketing objectives. Each campaign is presented in a live webinar and comes with:

- Step-by-step Marketing Toolkit
- FINRA-reviewed marketing materials
- Strategy brief
- Campaign checklists & worksheets
- Postcards
- Email invitation and reminders
- Phone scripts
- Comprehensive client-facing presentation materials
- Everything necessary to launch the campaign

Marketing materials can be personally branded with your picture, logo, name, contact information, and disclosures.

Materials are reviewed by FINRA when necessary and a letter is provided in your Toolkit to help you expedite compliance.

Helps Me Systematize My Marketing

*"I started using **Advisor/ Client** because I needed a better marketing plan. I like it because it has great ideas, it follows a systematic process and it is compliance approved. I think the best feature is that the campaigns are complete from start to finish and you can customize them based on your individual practice needs. Advisor/Client has helped me systematize my marketing and that is a major achievement."*

— Todd B., Wilmington, MA

The Complete Advisor/Client Marketing Program

Whether you're looking for strategic insights or actionable tactics, Advisor/Client offers materials, campaigns, and systems that can help you reach out to your target market in a natural and believable way.

1. **Marketing Strategy Sessions**
   - The "Pump It Up, No Excuses" Advisor Marketing Boot Camp (5 sessions)
     - How to Build a Killer Marketing Program for 2015
     - Rock 2015 With a 1-Page Marketing Plan
     - Jump Start Your 2015 Marketing With a Quick Client Feedback Survey
     - Client Event Clinic: 2015 Events to Schedule Now!
     - 6 Hot-Button Marketing Messages Every Advisor Needs
   - Rich Niche Jump Start Program: Find Your Niche in 30 Days (3 sessions)
     - Zero In on the Perfect Niche
     - Develop Your Niche Expertise & Marketing Plan
     - Launch a Niche E-Book and Market It on LinkedIn
   - Set Up Your 2015 Communications Master Plan
   - Mid-Year Check-Up: Adjusting for a Great Year End
   - Bringing in Year-End: The Fourth Quarter Push

2. **Communication Programs**
   - Key Financial Data (2-3 touches)
   - Monthly Touch Campaigns (12 touches)
   - Quarterly Financial Deadlines Postcards (20 touches)
   - 1 Minute Memos (12 touches)
   - Savvy Cybersecurity
   - Financial Crisis Communications Plan (as needed)
   - Caregiver's Email Blast (3 emails)
   - Late Stage College Funding Email Blast (3 emails)
   - Rollover Blunders (11 emails)
   - Over 80 Article Reprints to send to clients & COIs

3. **Referral Marketing**
   - 4 Referral Letters That Remind Clients to Share You With Friends & Family
   - Grow & Deepen Your COI Community Referral Network
   - Key Birthdays Referral Postcard
   - Build an Onboarding System That Dazzles Clients & Gets Them Talking About Your Service

4. **Event Marketing**
   - Milestone Celebrations: Easy, Productive & Fun!
   - Client Event Clinic: The Ultimate Guide to Hosting a Client Appreciation Event
   - Grow Your Prospect List With Easy-to-Market Monthly Events
   - Host a Charity Event: How to Raise Funds While Building Your Brand
   - Touchdown! How to Host an Unforgettable Super Bowl Party
   - Summer Prospecting: Host a Fun Social Event With Your Best COI
   - Spring Fling: Throw a Sports Party for Clients in Need of Spring Break
   - Host a Low-Stress, Open House Holiday Wine Event
   - Client Event Clinic: Holiday Prospecting

5. **Online Marketing**
   - Build Your Own HNW Prospect List
   - Social Media: Fun, Easy Ways to Market on FB, LI, Twitter
   - Turn Your Website Into a Marketing Machine
   - LinkedIn Prospecting

6. **Client Prospecting**
   - Host a Retirement Income Workshop for Pre-Retirees
   - IRA Rollovers: Capture More Pre-Retiree Business with Lunch & Learns
   - Financial Fitness Checkup
   - Last Chance Checklist
   - Perpetual Prospecting

7. **COI Prospecting**
   - Your 2015 CPA Marketing Plan
   - How to Get in Front of CPAs
   - CPA Tax Briefings
   - CPA Tax Season Email (1 email)
   - CPA Social Security Email Blast (3 emails)
   - COI Roundtable: Tapping Into Retirement Accounts
   - COI Roundtable: Navigating the NIIT
   - Host a "Wealth Summit" With Your Best Clients' Trusted Advisors

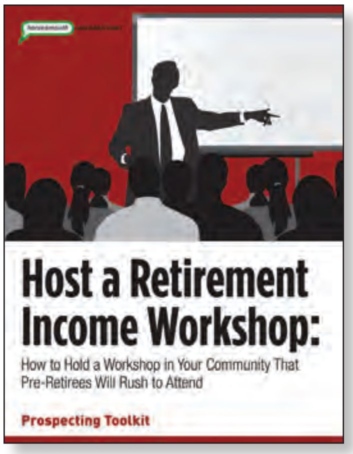
The 2015 Advisor/Client Marketing Schedule

Look what we have on tap for 2015!

Date	Webinar	Description
1/8/2015	Engage Now! Set Up Your 2015 Communications Master Plan	Set up a content strategy that will keep you top-of-mind with clients, prospects, and COIs throughout 2015.
1/15/2015	***Advisor Marketing Boot Camp, Session 1:*** Hell Yes! Hell No! How to Build a Killer Marketing Program in 2015	Assess your marketing capabilities with a “discovery” session that helps you strategize your direction for the new year.
1/22/2015	***Advisor Marketing Boot Camp, Session 2:*** Rock 2015 with a 1-Page Marketing Plan	Build a “marketing allocation” that will systematize all your marketing activities in 2015.
1/29/2015	***Advisor Marketing Boot Camp, Session 3*** Client Event Clinic: 2015 Events to Schedule Now!	Successful events take planning. Strategize your 2015 event marketing plan so you know what your year will look like.
2/5/2015	***Advisor Marketing Boot Camp, Session 4:*** Jumpstart Your 2015 Marketing With a Quick Client Feedback Survey	Know your market. Send clients a super-simple 10-question survey to gain valuable insights on what to focus on in 2015.
2/12/2015	***Advisor Marketing Boot Camp, Session 5:*** 6 Hot-Button Marketing Messages Every Advisor Needs	Capture prospects’ attention with 6 marketing messages that make you memorable.
2/19/2015	***CPA Connect, Session 1:*** Your 2015 CPA Marketing Plan	Strategize 12 months of marketing activities to help you meet and cultivate your best COIs—especially CPAs.
3/12/2015	Savvy Cybersecurity	Be your community’s knowledgeable resource on the variety of frauds and scams targeting the public.
3/26/2015	Client Event Clinic: Summer Fun	Start planning fun summer social activities for clients, prospects, and COIs now.
4/23/2015	***CPA Connect, Session 2:*** How to Get in Front of CPAs	Get in front of 10 CPAs in the next 60 days with a step-by-step system for contacting, meeting, and cultivating CPAs and other COIs.
5/7/2015	***Rich Niche Prospecting, Session 1:*** Zero in on the Perfect Niche	7 steps for nailing a target market that will build more business, close more prospects, and generate more referrals.
5/14/2015	***Rich Niche Prospecting, Session 2:*** Develop Your Niche Expertise & Marketing Plan	Create a marketing plan that showcases your expertise and captures the attention of niche leaders.
5/21/2015	***Rich Niche Prospecting, Session 3:*** Launch a Niche E-Book & Market It On LinkedIn	Build your first niche campaign by creating a hot-button e-book to market on LinkedIn.
6/25/2015	Mid-Year Check-Up: Adjusting for a Great Year End	Stay on track with a summer referral campaign and event plan for hosting educational workshops this fall.
7/16/2015	***CPA Connect, Session 3:*** Fall Marketing With CPAs	Set up a series of client education workshops and high-level strategy meetings with your favorite COI(s).
7/23/2015	Build an Onboarding System That Dazzles Clients & Gets Them Talking About Your Service	Establish a welcome process that engages new clients, showcases your services, and gets them talking about you.
9/3/2015	Bringing in Year End: The Fourth Quarter Push	Get started now with some easy marketing efforts you can ramp up quickly to bring in a great year end.
9/17/2015	***CPA Connect, Session 4:*** Establish a Formal COI Referral Network	Build your own personal network of professional referral sources who meet regularly to exchange advice, insights, and new business.
10/8/2015	Client Event Clinic: Holiday Prospecting	How to host a client appreciation party plus tips on social prospecting during the holidays.
11/5/2015	Turn Your Website Into a Marketing Machine	Generate leads and engage prospects with tips, tools, and best practices for effective online marketing.
12/3/2015	2016 Financial Fitness Checklist	Questions to ask clients and prospects every year to reveal new opportunities and deliver your best service.

Prospecting Campaigns: Ready-to-Use, Turnkey, Year-Round, Built-in Discipline

Members report that the Prospecting Campaigns are worth the price of the program itself. You can stop worrying about the nuts-and-bolts details of always creating new marketing campaigns and focus your energies on the other important areas of your practice.



Retirement Income Workshop (PDF)

Host a Retirement Income Workshop

Host an event that gets you in front of pre-retirees on a critical topic that gains more urgency every day. The workshop gets investors thinking about how they will live in retirement in preparation for crafting their retirement income plan.

Includes:

- 45-min “Life After Work” presentation & script
- 2 promotional postcards (PDF)
- Emails & phone scripts
- Workshop handouts
- Schedule & Checklists
- 4-step follow-up schedule
- FINRA review letter
- Complete Marketing Toolkit & webinar

Rollover Lunch & Learn (PDF)

The Rollover Lunch & Learn

Capture more retirement-plan rollover business with a lunch & learn that gets you in front of plan participants about five years from retirement.

Includes:

- 45-min “How to Get Rollover Ready” presentation & script
- Promotional postcard (PDF)
- Email invitations & phone scripts
- Introduction letter to plan sponsor
- Lunch & Learn flyer template
- Workshop handouts
- 3-part workshop follow-up with materials
- Rollover Ready Kit with 4 checklists (PDF)
- 11-touch email series on Rollover Blunders
- FINRA review letter
- Complete Marketing Toolkit & webinar

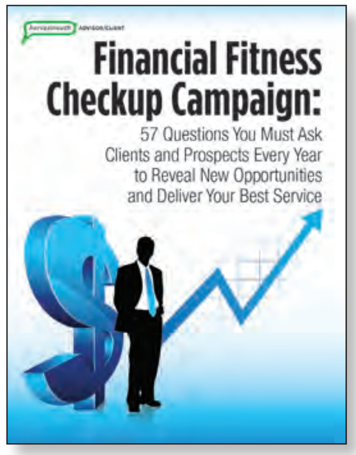
Visit www.horsesmouth.com/AdvisorClient to learn more.

Financial Fitness Checkup

This step-by-step service and education campaign helps you to position yourself as a "big-picture advisor" to clients and prospects. Use this campaign to identify investors' short-term expectations and plug holes in their portfolios and financial plans.

Includes:

- 4-page, 8.5" x 11" checklist (PDF)
- 3-step marketing campaign with emails & phone scripts
- Meeting worksheet
- Quarterly progress reports
- Complete Marketing Toolkit & webinar
- FINRA review letter



Financial Fitness (PDF)

Brings In New Business

*"I sent out 1500 copies of **Financial Fitness Checklist** and received over $270,000 in revenue from it and lots of responses."*

– Bryan U., St. Clair, MI

Tax Briefings Workshop

Target the $200,000+ high-income investor with educational events hosted by you alone or by you and your best CPA. This campaign is designed to get you in front of high-earning investors, strengthen your relationships with CPAs, and demonstrate to clients and prospects your knowledge and expertise.

Includes:

- 35-min Tax Briefings presentation & talking points
- 2 client invitation emails and phone scripts
- Email confirmations & reminders
- Follow-up thank you note & emails
- Resource materials
- Complete Marketing Toolkit & webinar

Tax Briefings Workshop (PDF)

Always Know What to Do Next

*"I just went independent and the strongest features of Advisor/Client are the **prospecting campaigns**. I like them because they are convenient, it's easy to delegate the time-consuming but necessary items, and the webinar guidance gives the program some personality. It's great always knowing what campaign to tackle next."*

– Chris A., Walla Walla, WA

Other Prospecting Campaigns...

- Grow Your Prospect List With Easy-to-Market Monthly Events
- How to Get in Front of CPAs
- Last Chance Checklist
- Launch a Niche E-Book and Market It on LinkedIn
- LinkedIn Prospecting
- Roundtable: Tapping Into Retirement Accounts
- Roundtable: Navigating the NIIT
- Perpetual Prospecting

Expert-Written Content: Stay Top-of-Mind With Memorable Client Communications

Never lack for something meaningful to share with prospects and COIs. Steady communications is crucial to building trust and credibility.

Got My Start-Up Off the Ground

"I am just starting my firm and I wanted a few turnkey ideas. That's why I started using Advisor/Client. There are three key things I like about it: it's concise, practical, and actionable. In my opinion, the strongest feature is the marketing strategies. In the start-up phase of my business, it is the most applicable. I've been piddling for a while putting together a marketing message and a COI campaign. Now with Advisor/Client, those two parts of the program are already in place. So it has been a great help."

– Scott P., Cincinnati, OH

Over the years, Horsesmouth has assembled one of the largest archives of articles and content that is available to financial advisors…90,000+ educational articles in all!

From this ever-growing database, we assemble the best articles to personalize, brand, and send to clients and prospects. With your Advisor/Client membership you get:

- ☑ Professional, expert-written articles on key themes that support and extend your communication and marketing strategies.
- ☑ Each article can be branded with your photo, logo, firm name, key contact information, and all required disclosures.
- ☑ You may send the online versions (PDF) of your branded articles to as many clients and prospects as you'd like.
- ☑ Every reprint comes with a FINRA review letter to help you expedite compliance approval.

Here is just a partial list of the Article Reprints you can choose from:

Investment Management

- How Rising Rates Affect Your Financial Plan
- Motivational Quotes from Legendary Wall Street Investors
- The Positive Side of Emotional Decision-Making
- Valuing Portfolios on an After-Tax Basis

Retirement Planning

- 5 Questions to Ask 5 Years Before You Retire
- A Quick Guide to Retirement Plans for Small Business Owners
- A Workable Solution for Baby Boomers Near Retirement
- Asset-Liability Matching for Retirees
- Cracking the Nest Egg: When Accumulation Becomes Distribution
- Developing a Realizable Vision for Retirement
- Estimating Health Care Costs in Retirement
- Funding a Start-Up in Retirement
- How Much Should Retirees Allocate to Stocks?
- Medicare and the Affordable Health Care Act

- NUA Tax Strategy: How to Roll Over Appreciated Company Stock
- Updated! Planning for a 30-year Retirement
- Retirement Income: Which Accounts to Tap First?
- The Art of Managing Retirement Assumptions

Social Security

- 3 Ways to Raise Your Social Security Benefit
- 6 Savvy Questions About Social Security
- Should Business Owners Put Their Spouse on the Payroll?
- Social Security Planning for Couples
- How COLAs Affect Social Security Benefits

Caregiving

- Holistic Help for Caregivers of Aging Parents
- Checklist: Is It Time for Assisted Living?
- Understanding Guardianship for Older Adults

College Planning

- Paying for College is a Family Affair
- 10 Tips for Maximizing Financial Aid
- Know the Rules for Education Funding
- Planning a Debt-Free College Education

Estate Planning

- An Overview of Asset Transfer Strategies
- Factors to Consider When Updating Insurance Coverage
- Last Will & Testament: Add a Letter Covering These 14 Wishes
- 10 Basic Questions of Estate Planning
- No-Regrets Lessons from a Man at Death's Door
- Protect Your Assets With a 'Family Bank'
- Selling Estate Assets at Auction

General

- 5 Ways to Boost Security Against ID & Credit Theft
- 7 Lessons From the 4th of July
- 50 Things a Professional Advisor Does for You
- A Pre-Divorce Checklist
- Creating a Financially Organized Life

And many more!

Over 90 article reprints!
(PDF)

Communication Programs: Get Clients Talking 'To' You and 'About' You

Set up a communications program based on one or more of the following campaigns to get in the right number of touches and stay top-of-mind with clients, prospects and COIs.

Best Money Ever Spent

*"I wanted to let you know that the cost of the **Key Financial Data Card** has been the best marketing money I have ever spent. I just received the copies that you printed for me, but I also had a PDF version of it as soon as I bought them online...*

"I think so far I've given away close to 150... I've been meeting with every CPA, tax attorney, business broker, mortgage banker, and anyone else I know that could refer me clients, and asking them how many others in their firm could use this 'cheat sheet'?

"One CPA asked for 15, so everyone in his firm that is doing taxes has my name, contact info, and photo close by them at all times... They can count on getting them from me every year going forward."

— Brian C., Brentwood, TN

Key Financial Data Card

This extremely popular data card lists all the brackets, thresholds, limitations, and exemptions that clients, prospects – even CPAs – need to know. Brand the card with your picture and logo, and you have an annual campaign people will look forward to every year.

Key Financial Data Card (PDF)

Includes:

- 8.5" x 11" data card (PDF)
- Personalized branding
- 4 cover letters for clients, prospects & COIs
- FINRA review letter
- Complete Marketing Toolkit & webinar

Key Planning & Investment Deadlines Postcards

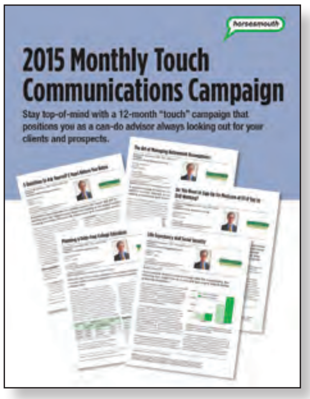
Nudge clients and prospects to call you with a quarterly postcard that reminds them of important financial deadlines ahead. The card also notes other special dates such as sporting events, holidays, and charitable causes.

Key Planning & Investment Deadlines Postcard (PDF)

Includes:

- 4 6" x 9" seasonal postcards (PDF)
- Personalized branding
- 4 Email cover letters
- FINRA review letter(s)
- Complete Marketing Toolkit & webinar

Visit www.horsesmouth.com/AdvisorClient to learn more.



Monthly Touch
12-Month Email Series
(PDF)

Monthly Touch 12-Month Email Series

Establish a turnkey, easy-to-execute ‘drip’ system that you can set and forget.

Includes:

- 12 expert-written articles on timely client pain points (PDF)
- 12 monthly “Financial Focus” themes
- 12 “Advisor Intros”
- Personalized branding
- Complete Marketing Toolkit & webinar

Great Way to Start the Year

*“We estimate our **‘Last Chance’** conversations translated into about $15,000 to $20,000 in additional revenue for us in the first and second quarter of 2014 … great kick-start to the year.”*

— Debra T., CFP®, JD, CPA, Franklin Lakes, NJ

Seasonal Emails for Clients, Prospects, and COIs

As the year progresses, reach out with a message geared to the season. Advisor/Client provides a number of emails and emails blasts tied to important financial events, with more added each year.

Includes:

- CPA Tax Season Email (2 emails)
- College Funding Email Blast (3 emails)
- CPA Social Security Email Blast (3 emails)
- Affordable Care Act/Medicare Data Card (annually)
- Social Security Data Card (annually)
- Cybersecurity Check-Up (annually)

Last-Chance Financial
Planning Checklist
(PDF)

Last-Chance Financial Planning Checklist

Designed to identify short-term opportunities, the Last-Chance Checklist triggers conversations with clients and prospects on their yearend needs. Moves business forward while you still have time to make adjustments.

Includes:

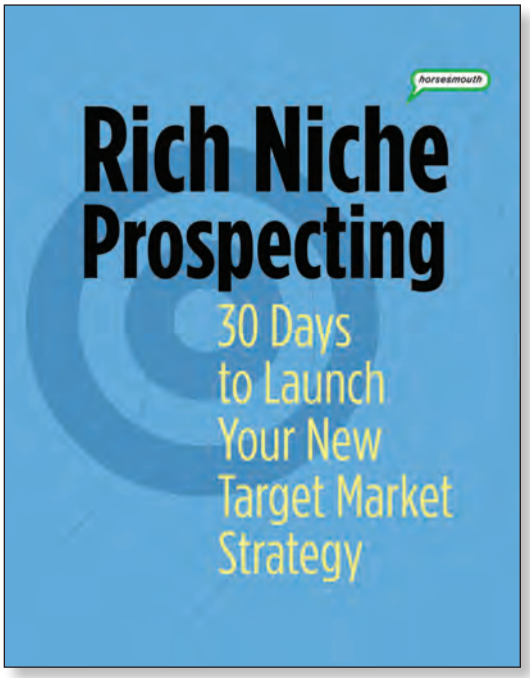
- 8.5” x 11’ postcard (PDF)
- Personalized branding
- Emails, phone scripts, referral tactics
- FINRA review letter
- Complete Marketing Toolkit & webinar

Other Communication Campaigns…

- Financial Fitness Campaign
- Key Birthdays Referral Postcard
- 1-Minute Memos
- Financial Crisis Communication Plan
- The Ultimate Advisor Marketing Kit
- Savvy Cybersecurity

Strategy Boot Camps: Create a Marketing Plan, Nail a Niche, Cultivate a CPA

You probably know what you need to do marketing wise—it's just a matter of putting your head down and knocking it out. That's why we hold specific Boot Camps throughout the year—to help you get common marketing tasks done and behind you.



Rich Niche Prospecting (PDF)

Rich Niche Prospecting: 30 Days to Launch Your New Target Market Strategy

This 3-part jumpstart program is designed to help you zero in on the perfect niche, develop your niche expertise, and create your first niche marketing campaign.

Session #1: 7 steps for nailing a target market that will build more business, close more prospects, and generate more referrals.

Session #2: Create a marketing plan that showcases your expertise and captures the attention of niche leaders.

Session #3: Launch your first niche campaign with an ebook you create specifically for your new target market. Then find new niche prospects by marketing your ebook online and through LinkedIn.

Rich Niche Helped Me Build My Business

*"A very long time ago I was part of the **Rich Niche** program. At the time my income was about $200,000 per year. Today it's over $2 million and I attribute a lot of that success to going through the program. Thank you!"*

— Thomas N., Novi, MI

"Pump It Up, No Excuses" Marketing Boot Camp (PDF)

Advisor Marketing Boot Camp: Put Your Marketing on the Right Course for 2015...Right from Your Desk

Need to reboot your marketing systems? The 5-session Advisor/Client Marketing Boot Camp helps you assess your marketing capabilities, identify marketing opportunities, create a one-page plan, and build 6 critical marketing messages for the year.

Session #1: How to Build a Killer Marketing Program in 2015

Session #2: Rock 2015 with a 1-Page Marketing Plan

Session #3: 2015 Events to Schedule Now!

Session #4: Start Branding With a Quick Client Survey

Session #5: 6 Hot-Button Marketing Messages Every Advisor Needs

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CPA Connect: Your Master Plan for Building a COI Network

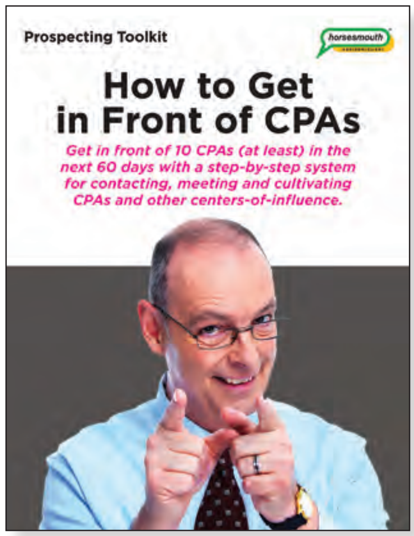
Finally, a CPA/COI strategy that demonstrates your value and expertise and builds two-way trust that boosts your client service and professional referrals.

Session #1: Strategize 12 months of marketing activities to help you meet and cultivate your best COIs—especially CPAs

Session #2: Get in front of 10 CPAs in the next 60 days with a step-by-step system for contacting, meeting, and cultivating CPAs and other COIs

Session #3: Set up a series of client education workshops and high-level strategy meetings with your favorite COIs

Session #4: Build your own personal network of professional referral sources who meet regularly to exchange advice, insights, and new business



CPA Connect

Other Strategy Sessions...

- Set Up Your 2015 Communications Master Plan
- Mid-Year Check-Up: Adjusting for a Great Year End
- Bringing in Year-End: The Fourth Quarter Push
- The Ultimate Advisor Marketing Kit
- Turn Your Website Into a Marketing Machine

Event Marketing: Educate and Socialize with Easy-to-Host Workshops and Get-Togethers

Because events are such an important component of advisor marketing, Advisor/Client offers about 15 different event campaigns—both educational and social—to help you turn prospects into clients and turn clients into raving fans.

Milestone Celebrations (PDF)

Milestone Celebration Events

Host a special birthday or retirement party for your very best clients and their friends. The Milestone Celebrations Campaign is designed to help you socialize with clients (service), meet their friends and colleagues (referrals), and get better acquainted with their adult children (multi-generational marketing). It's a networking strategy that marries prospecting with client service.

- Invitation script & emails
- Email confirmation & reminders
- Follow-up materials, script & schedule
- Party themes list
- Toasting tips and samples
- Retirement party music play list
- Complete Marketing Toolkit & webinar

Monthly Marketing Events (PDF)

Monthly Marketing Events

Host a lunch, dinner, breakfast, or coffee on a regular—preferably monthly—basis. These ongoing events are informal, half socializing/half educational get-togethers that provide clients and prospects with a non-threatening environment to get to know you and introduce you to their friends.

- Email Invitations & Reminders
- Phone scripts
- Video recording tips
- Thank You Note & Follow-Up Emails
- Press release template
- Special events calendar
- List of 14 formats to choose from
- Complete Marketing Toolkit & webinar

Holiday Wine-Tasting Event

Approach the biggest and busiest prospecting season with confidence…along with a “socializing strategy” that can help you talk to clients, community leaders, COIs, and all those desirable prospects that you’ve always wanted to meet.

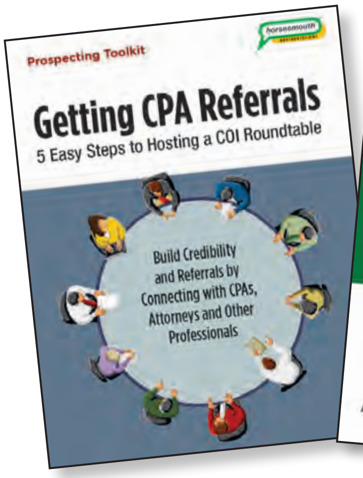
- Invitations & phone scripts
- Follow-up schedule & materials
- Holiday Gift Giving for Advisors: Your Complete Guide to Fast, Easy and Memorable Picks
- Wine tasting supply list
- Wine tasting grid sheet
- Complete Marketing Toolkit & webinar

Holiday Wine-Tasting Event (PDF)

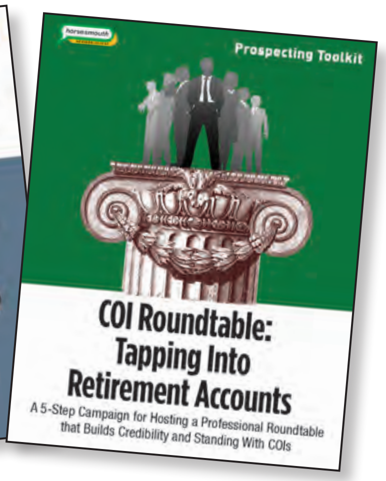
COI Roundtables (2)

The two roundtable campaigns offer a working lunch for centers of influence (COIs) to meet and discuss a current “hot topic” in the industry. These campaigns help you cultivate new professional referral sources and demonstrate your professionalism and expertise.

- 10-15 min PowerPoint presentations (2)
- Topic 1: Navigating the Net Investment Income Tax
- Topic 2: Tapping Into Retirement Accounts
- Email invitations & phone scripts
- Workshop discussion questions & handouts
- 3-touch follow-up schedule & materials
- Complete Marketing Toolkit & webinar



Net Investment Income Tax Roundtable (PDF)



Tapping Into Retirement Accounts (PDF)

Other Event Campaigns…

- The Ultimate Guide to Hosting a Client Appreciation Event
- Host a Charity Event: How to Raise Funds While Building Your Brand
- Touchdown! How to Host an Unforgettable Super Bowl Party
- Throw a Sports Party for Clients In Need of a Spring Break
- Hot Summer Client Events: Expand Client Relationships by Hosting a Fun Family Get-Together
- CPA Tax Briefings
- Host a Retirement Income Workshop for Pre-Retirees
- IRA Rollovers: Capture More Pre-Retiree Business with Lunch & Learns
- Client Event Clinic: Summer Fun
- Client Event Clinic: Holiday Prospecting

Meet Your ‘Marketing Department’

As an Advisor/Client member, you enjoy all the benefits of an in-house marketing department including on-demand campaigns, personalized coaching, and live webinars.

Wendi Webb, Director of Horsesmouth Marketing Programs (aka “The Drill Instructor”)

Wendi Webb has been marketing for 20 years to lawyers, CPAs, and high net worth investors. Before Horsesmouth, she was the marketing director for a financial advisory firm where her sole purpose was to get the founders of the firm in front of qualified HNW investors. She has written, designed and developed almost every kind of marketing deliverable from workshops, seminars, cruises, sales letters, brochures, press releases, radio, direct mail and direct referral campaigns. She has her MBA from Pepperdine University and passed the CIMC test, which subsequently merged into today’s CIMA.

Janet Bernstel, Senior Editor and Marketing Specialist (aka “The Party Pirate”)

Janet Bernstel has been a journalist for over 15 years working as a columnist, web content producer and author. She has written three business books, and was the primary feature writer for a bank marketing magazine for 12 years. Her passion for marketing rivals her zeal for sailing and fine cuisine. She completed a professional program at the Culinary Institute of the Arts in Hyde Park, N.Y., before spending time as a private yacht chef in the Caribbean. She recently earned a Masters degree in Interactive Media from Quinnipiac University.

Sean Bailey, Horsesmouth’s Editor-in-Chief (aka “The Hammer”)

Sean Bailey has been working closely with Financial Advisors on their marketing practices since 1999. His marketing philosophy is deeply influenced by the thinking of Robert Cialdini, Eugene Schwartz, and Sigfreid Vogel. All three experts emphasize the critical importance of anticipating your audience’s needs and crafting your messages on a personal level that seeks dialog around those needs. Prior to joining Horsesmouth, Sean was a daily newspaper reporter for The News and Observer of Raleigh.

The Advisor/Client Newsletter

Every month Wendi writes a newsletter offering real-time marketing insights on how to apply the marketing principles you’re learning in Advisor/Client to real world situations. Recent newsletter themes are:

- 3-Step Mini Marketing Campaign for Fall
- Attracting Young Investors
- How to Market to CPAs in February

The Advisor/Client 100% Risk-Free Guarantee... Give It a Try!

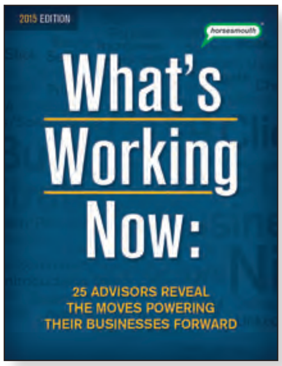
100%
Satisfaction Guaranteed

The Advisor/Client program is all about helping you save time and money by delivering important, relevant marketing and communications programs you can use to connect meaningfully with clients and prospects.

If you're not completely satisfied with the quality of the program we'll issue a 100% refund of your membership. You just need to confirm you've deleted all materials you received under the Advisor/Client license. It's that simple. So joining is completely risk-free.

Don’t Lose This Chance to Get 3 Bonus Gifts!

To kick-off your Advisor/Client membership, you get these 3 New Member bonus gifts designed to expand your thinking about you, your business and your clients.

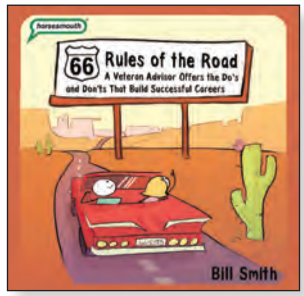


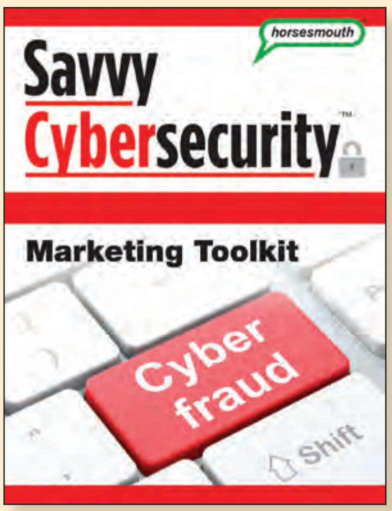
BONUS #1 What’s Working Now, 2015 Edition: 25 Advisors Reveal the Moves Powering Their Businesses Forward ($97 value)

Get in-depth, first-person accounts from advisors discussing critical tactics and strategies that work. Topics include: client events, communication, staff, teams, seminars, speaking, health, business strategy, prospecting, networking, and niche building. This hard-copy, spiral bound, 8.5” x 11”, 125-page report will be delivered to your office and give you insights and ideas into running your own advisory practice. Hard copy shipped to your office. ($97 value)

BONUS #2 66 Rules of the Road: A Veteran Advisor Offers the Do’s and Don’ts That Build Successful Careers ($27 value)

Horsesmouth columnist and top advisor Bill Smith boils down 33 years of wisdom in this fast-paced look at the simple but effective practices that keep clients happy, teams organized, and advisors relaxed and sane. A perfect refresher for veterans and newbies alike. Hard copy shipped to your office. ($27 value)





BONUS #3 Savvy Cybersecurity Client Education Program ($597 value)

As an Advisor/Client member, you get the complete Savvy Cybersecurity program to present to clients, prospects, and business leaders in your community. The education program includes:

- Savvy Cybersecurity Reference Guide (PDF)
- Client presentation: “1-Hour to Savvy Cybersecurity: 10 Threats Every Person and Business Faces—and How to Fight Them Now”
- Monthly e-newsletter and alert newsletter
- FINRA-reviewed Article Reprints for clients on cybersecurity
- The complete Savvy Cybersecurity Marketing Toolkit (PDF)

$597 VALUE!

Visit www.horsesmouth.com/AdvisorClient to learn more.

Imagine, All Your Marketing Strategies and Tactics Covered for Just $2.46 Per Day...

Become an Advisor/Client Member Today and Get Three Bonus Gifts ($721 value)

☑ **YES! I want my own marketing department!** Sign me up for one year of the Advisor/Client Marketing Program with the 45+ campaigns, the live coaching and instruction, and the proven marketing materials, strategies, checklists, and timelines.

DEADLINE: Act by Dec. 31st to save $100!

☑ **Because I'm becoming a member by Dec. 31st, I'm paying $897 and saving $100 off the 2015 rate.** Plus, I get three bonus gifts and my membership is covered by a 100% Risk Free Guarantee (see page 17)

2 Simple Ways to Order:

1. Go to www.horsesmouth.com/AdvisorClient
2. Call 1-888-336-6884 Ext 1 for more information

Still Not Sure? See for yourself with a no-obligation, personalized tour of the Advisor/Client Marketing Program. We'll show you everything we've got and let you decide.

Call us today at: 1-888-336-6884

Horsesmouth
21 West 38th Street
14th Floor
New York, NY 10018

What Advisors Say About Advisor/Client

"A/C is an awesome resource – particularly for a solo practitioner like myself. It's the brains behind my 'marketing department.'

– Mark D., Jacksonville, FL

"A/C is without a doubt the best marketing program I have ever used in my 17 years as an advisor, and I have personally trained over 1200 advisors on marketing programs."

– Kontar M., Denver, CO

"The A/C program gives me the tools I need to establish the processes that I've always known I should be doing, but just wasn't creative (or organized) enough to do on my own."

– Gary W., Union, KY

Call Now for a 10-Minute Desktop Demonstration of the Advisor/Client Marketing Program: 1-888-336-6884 Ext. 1