

The Exceptional AdvisorSM

You are a successful financial advisor who is determined to get to the next level. Confident of your professional capabilities, it is time to get the word out. Meet **The Exceptional AdvisorSM**: A program of cost-effective, customized marketing communications based on your practice, your business development objectives, and your timetable.

When it comes to attracting target clients, you know that finding the right approach and telling your best story can mean the difference between success and failure.

We apply the best marketing practices of successful advisors and firms to provide individual marketing plans and custom brochures to fuel your business development activities.

Financial advisors find they need a disciplined gameplan — and a few basic tools — to promote themselves in a methodical, organized, and effective way.

That's where **The Exceptional AdvisorSM** comes in. Think of it as the basic equipment to help you build upon your strong, growing practice.

The Exceptional AdvisorSM Your Choice:

1. An **all-purpose financial advisor bio** is an 8.5 x 11 sheet that captures your professional experience and proficiency, education and areas of focus so prospects can see at a fast glance the strengths that you bring to an investment relationship.
2. A 6-panel **personal marketing brochure**, perfect for sending with a cover letter. The brochure tells your story in an easy-to-read, attractive format with appropriate space for discussion of your unique strengths and special qualities, your investment process and the client profile you are serving.
3. An 8-plus page **personal marketing brochure**, professionally side-stitched and designed to reflect your mission, services and commitment to clients with as many pages (increments of four) that you need to convey your message and information.

Best of all, **The Exceptional AdvisorSM** allows you to benefit from materials presented to you in the exact way you specify — fully written, designed, and printed¹ OR as final manuscript copy ready to hand over to a central headquarters marketing representative for implementation.

The Exceptional AdvisorSM Each of these personal marketing tools includes: consultation, copywriting and finished artwork:

- All-purpose financial executive bio (upcharge for team or firm bios)
\$1,999
- 6-panel personal marketing brochure to fit #10 envelope with choice of photos (excludes printing or custom photography)
From \$2,299
- 8-plus page personal marketing brochure to fit #10 envelope with choice of photos (excludes printing or custom photography)
From \$2,999

¹ Printing is available at a separate cost, depending on quantity and other specifications.



And if **The Exceptional AdvisorSM** sounds to you like only a starting place, read on to discover some optional extras to further enhance your practice marketing efforts.

The Exceptional AdvisorSM Extras

Practice Pitch Book \$2,500 and up

Choose the LederMark pitch book construction model and simply insert your copy when prompted by our headings. It's surprisingly easy to build an effective pitch book around your own content – or content we can generate for you optionally – by following our disciplined sequence for promoting your advantages and signaling your strengths to your prospects.

Full-size Custom Brochure (Price upon request)

A team or practice needs a marketing brochure to create a first and lasting impression. The 8½" x 11" or 9" x 12" brochure features photography, descriptive copy written just for you, and an optional back pocket for ADV, fee schedules or information about your team.

Public Relations Package \$2,499

Based on your experience, certifications, memberships and other industry ties, you may be eligible to submit credentials for inclusion in one or more industry rankings. Financial Advisors with quality credentials can be considered for an appropriate, high-profile ranking of financial advisors. What's more, whenever it's time to share your successes with local or industry media, you'll need the appropriate press release format/shell to get the job done. Our package comes with sample media releases.

Personal Marketing Communications Plan \$2,499

Your personal **marketing communications plan** defines your distinctive positioning, refines your brand promise and offers a tactical gameplan with recommended action steps for promoting your practice to your target investor and bringing your practice closer to your successful vision.

Web Site Content (price upon request)

Do you need the words and pictures to assemble a full-blown Web site for your practice – or only a single Web page of copy and artwork? Either way, we can provide content and approach to prepare you to work with your Web site vendor to develop your site.

About Us

The Exceptional AdvisorSM is an offering of LederMark Communications, a marketing strategy and communications firm serving financial advisors, investment firms and asset managers since 1999.