

MARKETING PLATFORM

FIVE CORNERSTONES OF FINANCIAL PLANNING 2.0™



HIGHLIGHTS



30

Attendees per Night



7

Appointments per Night



\$1MM

Assets per Client

The Five Cornerstones of Financial Planning 2.0 marketing platform is a dinner workshop that focuses on holistic financial planning. Its conceptual design and comprehensive approach make it the perfect tool for high net-worth client acquisition.

SETTING

High-profile restaurant with national recognition or locally renowned venue. Steakhouses and Italian restaurants are strongly suggested.

MARKETING

The preferred method to market a dinner-seminar is still direct mail. Invitations should be quality, wedding-style mailers. Digital and Radio advertising should only be used as supplemental marketing.

CONTENT

5CFP 2.0 is presented using flash-based animations. The content is conceptual in nature and focuses on: investment planning, tax planning, retirement planning, insurance planning, and investment planning. Attendees are encouraged to sign up for a complimentary consultation via three different call-to-actions.

According to the National Bureau of Economic Research, over 2.9 million U.S. residents ages 50 and older made an investment after attending a dinner seminar in the last five years.

KEY TO SUCCESS

The Concierge Team at **Concierge Marketing** plays an essential role in events targeted towards high net-worth individuals. From the event registration to the post-event follow-up, our skilled staff will connect with each prospect to develop a relationship on your behalf. During this process, our team will handle all of the communication, including emails, letters, and text messages. **This is always done as an extension of your practice, your clients will never know anything about Concierge Marketing.**

PRICING

Presentation Licensing <i>Licensing is valid for 6 months.</i>	\$1,000
Marketing Cost <i>Minimum marketing for a 2-night event. Pricing includes full Concierge Service. Additional mailers are charged at \$0.80 each.</i>	\$8,500
Supplemental Marketing - Social Media <i>Three-week Social Media campaign.</i>	\$1,250
Supplemental Marketing - Radio <i>Ten 30-second ad spots.</i>	Varies by Market

LET'S TALK

At **Concierge Marketing** we offer financial professionals true turn-key marketing platforms. We recognize how important comprehensive client-acquisition strategies are to being successful, so we offer everything you'll need to create a remarkable first impression.

Whether it is **marketing, branding, or production**, our talented team members will help you implement the strategy that is right for you. Call us today to schedule your personalized demo.



CONTACT US

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