

## MARKETING PLATFORM FINANCIAL EDU™



### HIGHLIGHTS



**25**

**Attendees per Class**



**9**

**Appointments per Client**



**\$500k**

**Assets per Client**

*Financial EDU™ is a comprehensive educational platform for adults. The purpose of the program is providing education related to personal finances and empowering students to enhance their knowledge of financial concepts and strategies.*

#### SETTING

Workshops are typically hosted at public libraries, recreation centers and schools that offer comfortable adult seating. We recommend to maintain a class-like atmosphere - no food is served.

#### MARKETING

Digital advertising is the primary method used to drive attendees. Radio and direct mail can be used to supplement the targeting of additional prospects.

#### CONTENT

Financial EDU™ workshops do not rely on stale and over-saturated topics such as Social Security or Retirement Planning. Instead, workshops offer holistic financial education that appeals to a greater demographic. Instructors use a 100-page workbook to deliver education on the five cornerstones of financial planning.

*Increase your credibility and get in front of more prospects without breaking the bank.*

## KEY TO SUCCESS

The Concierge Team at **Concierge Marketing** plays an essential role in making sure you connect with quality prospects. From the event registration to the day of the event, our skilled staff will connect with each prospect to develop a relationship and assure them a positive experience. During this process, our team will handle all of the communication, including emails, letters, and text messages. **This detailed-oriented process increases the number of quality prospects that attend the workshop.**

## PRICING

<b>Presentation Licensing</b> <i>Licensing is included per one-day event.</i>	<b>Included</b>
<b>Marketing Cost</b> <i>Minimum marketing for a one-day event. Pricing includes pre-event Concierge Service. Digital marketing only. Includes optimized landing page, targeted ad-set (proprietary algorithm) and campaign management.</i>	<b>\$3,000</b>
<b>Supplemental Marketing - Catalogue Mailers</b> <i>5,000 8-page, full-color, college-style mailers. Additional mailers are charged at \$0.90 each (same event). Design and management included.</i>	<b>\$4,500</b>
<b>Supplemental Marketing - Postcard Mailers</b> <i>5,000 full-color postcards. Additional mailers are charged at \$0.54 each (same event). Design and management included.</i>	<b>\$2,700</b>
<b>Supplemental Marketing - Radio</b> <i>Three-week Radio campaign. Includes production and campaign management.</i>	<b>Varies by Market</b>
<b>Class Workbook</b>	

## 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.



### CONTACT US

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