

MARKETING PLATFORM

OVERTAXED



HIGHLIGHTS



30

Attendees per Night



5

Appointments per Night



\$2MM

Assets per Client

The Overtaxed marketing platform is based on the bestseller by a similar name. It focuses on key, high-level, tax-advantaged and tax avoidance strategies. This subject matter appeals to individuals who are already working with an investment adviser or broker, but usually lack tax planning advice.

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

Overtaxed is presented using flash-based animations. The content is conceptual in nature and focuses on recent tax law changes, tax diversification, tax efficiency, and tax-advantaged strategies.

Workshops that focus on individual products don't work well with smart clients. If the seminar presents concepts and ideas that you can buy anywhere, your odds of acquiring larger clients increase.

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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