

MARKETING PLATFORM

**THE MOST COMMON
ESTATE PLANNING MISTAKES**



HIGHLIGHTS



40

Attendees per Night



6

Appointments per Night



\$1MM

Assets per Client

Estate Planning continues to be hot topics for individuals looking to protect and preserve the things that matter the most: family, legacy and values. The Most Common Estate Planning Mistakes system offers a simplified and refreshing take on wealth transfer.

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

The material is presented using flash-based animations. The content is conceptual in nature and focuses on: beneficiaries, extended powers, and investment options.

According to AARP, 82% of baby boomers have at least one component of Estate Planning in place. These documents need to be updated periodically, which creates great opportunity for financial professionals.

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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