Quarterly Marketing Activity Plan | 4Q 2016

**Prepared for:** [Advisor name]

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| TARGET/Niche Market | Quarterly Goals |
| [Include description of niche market here] | 1. Number of COI referral activities: X
2. Number of client referral activities: X
3. Number of networking events: X
4. Number of workshops/presentations/speaking engagements: X
5. Number of blogs/articles: X
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| Targets |
| **Target COIs for referrals** | [Include names of 12–24 people] |
| **Target clients for referrals** | [Include names of 12–24 people] |
| **Target networking groups** | [Include 3 to 7 groups] |

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| Quarterly Marketing Activity CALENDAR |
|  | **October** | **November** | **December** |
| **Center of influence referral activities** | [ ]  [Activity]: [Name] [Date][ ]  [Activity]: [Name] [Date] | [ ]  [Activity]: [Name] [Date][ ]  [Activity]: [Name] [Date] | [ ]  [Activity]: [Name] [Date][ ]  [Activity]: [Name] [Date] |
| **Client referral activities** | [ ]  [Activity]: [Name] [Date][ ]  [Activity]: [Name] [Date] | [ ]  [Activity]: [Name] [Date][ ]  [Activity]: [Name] [Date] | [ ]  [Activity]: [Name] [Date][ ]  [Activity]: [Name] [Date] |
| **Networking activities** | [ ]  [Activity]: [Name] [Date][ ]  [Activity]: [Name] [Date] | [ ]  [Activity]: [Name] [Date][ ]  [Activity]: [Name] [Date] | [ ]  [Activity]: [Name] [Date][ ]  [Activity]: [Name] [Date] |
| **Public events (e.g., workshops/ presentations/speaking engagements)** | [ ]  [Event]: [Topic] [Date] | [ ]  [Event]: [Topic] [Date] | [ ]  [Event]: [Topic] [Date] |
| **Blogs/articles** | [ ]  [Publication]: [Title] [Date] | [ ]  [Publication]: [Title] [Date] | [ ]  [Publication]: [Title] [Date] |
| **Innovative idea** | [ ]  [Idea] | [ ]  [Idea] | [ ]  [Idea] |