



Outsourced Marketing Department

Strategic and Creative Support to Implement Your Marketing Plan

Doing the Work So You Don't Have to

As an independent financial advisory firm, you face a dilemma. You need to market your business to attract new clients, but your time and your staff's time are already devoted to serving your existing clients. You know that the key to marketing your firm is focus and consistency, but it's difficult to stay on top of your marketing campaigns and still manage your other responsibilities. You need a solution that adds significant value, requires minimal supervision and fits your budget.

As a boutique marketing firm, we provide a select number of RIA firms with \$1 million to \$10 million in revenue the resources of hiring an entire marketing department at a fraction of the cost. We develop an annual marketing plan for your firm and provide the team and expertise to implement the strategies. When you work with us, you gain the freedom to put your focus on your existing clients, knowing that your outsourced marketing department is working on your behalf.

Common Challenges

- How do I reach my ideal client, and what strategies will attract them?
- How do I implement an effective marketing plan?
- Am I communicating the right message to prospects?
- What can I do to differentiate my firm from competitors?
- How do I develop referral relationships?

How We Support You

We don't just consult with firms on how to market; we do the work. We provide the strategic and creative support required to execute the long-term vision and day-to-day tactics of your plan. Because our focus is independent advisory firms, our expertise is relevant to firms like yours:

- A strong understanding of best practices within the financial services industry
- Sensitivity to SEC and FINRA marketing compliance guidelines
- Extensive experience with marketing channels specific to the financial advisory industry

Your marketing strategies are carried out by a team that includes a marketing strategist, project manager, graphic designers, email and digital marketing coordinators, copywriter and copyeditor. Although the entire team's goal is to fully execute your marketing plan, you enjoy the convenience of working with a dedicated point of contact throughout the engagement.

What You Receive

With our outsourced marketing department program, you receive:

MONTH 1: ANNUAL MARKETING PLAN

- A two-hour assessment phone call to evaluate your firm's current situation, goals, target market, existing campaigns and marketing collateral
- Annual marketing plan and calendar covering the length of the engagement

MONTHS 2-12: ONGOING IMPLEMENTATION

- One 1-hour meeting per month with a marketing strategist to discuss your plan's progress, strategies, campaigns, training on marketing tactics, and new ideas
- 25 to 45 hours per month of creative services depending on package
- A dedicated project manager responsible for moving your marketing plan forward
- A team of creative professionals working behind the scenes to implement your initiatives
- Discounted video production and ghostwriting services
- Inclusive access to all the services listed on our website with the exception of video and ghostwriting: kaleidocreative.com/services

What We Deliver

- Awareness campaigns
- Blog management
- Branding
- COI campaigns
- Community outreach strategies
- Copywriting
- Content marketing
- Drip marketing
- Email marketing
- Event marketing support
- Graphic design
- Inbound marketing
- Lead magnet campaigns
- Marketing collateral
- Online advertising
- Pitch books
- PowerPoint presentations
- Press release writing and distribution
- SEO strategies
- Social media strategies
- Website copywriting and project management

Starting at
\$3,000/month