

TIPS for Marketing With Financial Planning Guides

Showing people how to minimize taxes, maximize wealth and achieve their financial goals is a proven way to build more profitable client relationships. This approach has many benefits:

- It strengthens awareness of your firm and positions you as an authority on the subjects discussed.
- It builds rapport and good will while educating readers about ways you can be of service.
- It shows the complexity of many financial planning strategies and the importance of working with a professional advisor to implement them successfully.
- It provides a basis for following up and starting a dialogue that can lead to requests for assistance with the financial matters involved.

One of the best ways to do this is with a financial planning guide from PDI Global. These professionally written booklets not only provide helpful overviews of the topics involved. They also encourage readers to contact a professional advisor — namely you — for assistance in selecting and implementing the strategies that are best for them. Here are some suggestions for getting the most out of these powerful marketing tools.

1 **Customize the covers with information about your firm and the services you provide.**

Our guides have extensive areas on the outside and inside covers that you can customize with your

logo, an introductory message, a description of your firm and the services you provide, or other information that supports your marketing initiatives. So at a minimum, make sure you make full use of this space to give your guide more marketing punch. Contact your PDI Global customer service representative for details.

2 **Use them in conjunction with PDI Global's Seminar-in-a-Box.**

This comprehensive seminar program, delivered on a CD, gives you everything you need to conduct successful financial planning seminars quickly, easily and cost effectively. In addition to a fully scripted PowerPoint® presentation and leader's guide, you get a work plan and budget, press releases, invitation, announcement, ad and follow-up letters. The seminar comes in three versions that can be customized with your logo and other information. See www.pdiglobal.com/Products/SIAB/index.asp for more on this versatile program.

3 **Hand them out at client meetings, seminars and sales calls, or use as follow-up.**

Take some guides with you to give out in face-to-face meetings, or send them out afterward as a way to follow up with those present. The guides are a lasting reminder of your firm and the services you provide. Many readers will file them away as reference items, so these booklets will have a favorable impact long after you distribute them.

4 Include them in direct mail campaigns, information packets and proposals.

PDI Global's financial planning guides are a great way to introduce your firm to prospects or remind clients and referral sources about ways you can be of service. For best results, send them out with a cover letter in an envelope that has a tag line, or include them in a pack of materials about your firm. Be sure to send them to your referral network so the people in it know how you can be of service to them and their clients. If you need help with mailing lists, we would be pleased to provide information about possible sources.

5 Send them as a thank-you, birthday greeting or holiday gift.

These guides are a great way to thank clients for their business. Include them with tax returns or financial statements, send them out as a thank-you for payment, or give them as a birthday present or holiday gift. Clients and referral sources will appreciate both the gesture and the helpful information you provide.

6 Use them to supplement your marketing newsletters.

Because these guides contain more on specific topics than a marketing newsletter has room to include, they are ideal for sending to select clients, prospects

or professional contacts between newsletter issues to provide more in-depth information on a subject that the newsletter introduced. If you order several guides, you can send them three or four times a year to your top 100 clients or prospects on a rotating basis. This will enable you to have more frequent communication with this key audience and inform them about topics that may be of special interest to them.

7 Follow them up with a call.

Giving or sending out a guide provides the perfect excuse for following up with a phone call to see if you could be of assistance or answer any questions about the subjects discussed. A phone conversation can help you learn about the client and identify ways you might be of service. At a minimum, the call helps to strengthen the relationship and can lead to an in-person meeting or request for assistance at a later time.

Start using them now

However you use them, PDI Global's tax, financial and business planning guides will enhance awareness of your firm, suggest ways you can be of service, and encourage recipients to call on you for assistance. Order several titles to address the needs of different markets and show the full array of your capabilities.

PDI Global, Inc. is the nation's leading provider of integrated strategic marketing and management solutions for CPAs, attorneys and financial advisors. Founded in 1980, PDI Global has helped thousands of clients reach their growth and profitability goals. PDI Global is the premier source of customizable niche marketing newsletters (print and electronic), available on an exclusive basis in specific markets, as well as custom client and employee newsletters, and content for Web sites and e-marketing initiatives. PDI Global also publishes tax, business and financial planning guides and provides strategic planning, partner retreats, and management, marketing and sales consulting and training.

For additional information about PDI Global products and services, call 800.227.0498 or visit www.pdiglobal.com.