

The "Daily Plan-It"™

ESTATE & BUSINESS LAW GROUP, P.C.

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Marketing Tips for the New Year

Now that January is here, you may be swamped trying to tie up loose ends that remain from 2006 and the holidays. However, the pro-active businessperson will still find the time to anticipate accomplishments he or she would like to achieve in the upcoming year, and create a plan to ensure that they occur. One of the ways to get a head start on success is by developing a marketing plan for the next 11 months before month one ends.

Marketing strategies for 2007

A recent article in the November issue of *Financial Advisor* magazine proffers the theory that it's not necessary for all financial advisors to have a marketing plan. That's nice in theory, but do you really want to take that chance? Here are several strategies to implement in 2007 to raise awareness of your services:

(1) **Share your expertise.** Brand recognition is the key to putting your services on the forefront of your clients' and prospects' minds. Write a column in your local newspaper that offers money-saving and/or planning ideas. Customers want to hire experts. When you're perceived as one, they're drawn to you.

(2) **Update your website.** An increasing number of people are turning to the Internet to research everything from cars to doctors to financial planners. Make sure that your website is well-designed and easy to navigate. Moreover, hire a specialist with experience in Search Engine Optimization (SEO) to learn how to effectively direct more people to your site. Bringing clients to your site is half the battle; making sure they can easily locate what they're searching for once they're there is the key to winning it. Putting yourself in the shoes of a potential new customer will inspire your clearest choices.

(3) **Maintain community awareness.** The role of a financial advisor is built on trust. Take time to support local charitable events, either by donating money or time. Sponsor concerts, local sporting events, and fundraisers for good causes. Donate a free consulting session to an auction. If you do good

work, in addition to putting yourself out as a community benefactor, you may additionally turn that freebie into a fee.

(4) **Communicate with clients.** Staying on the top of the mind of your clients is the key to referrals and repeat business. Stay in touch, whether it's sending a newsletter, some friendly correspondence, or communicating relevant changes in tax laws that effect planning. To turn an old maxim on its head—in their sight, in their mind.

(5) **Develop strategic alliances.** Now's a great time to connect to other industry professionals in order to develop referral sources that will lead to new clients.

Carve out a space in your calendar to develop and implement your marketing plan for 2007. By creating goals for the new year and taking steps to manifest them now, you'll make sure that you don't drop the ball before the first quarter comes to a close and the energy we start the New Year with has fizzled.

Workshop Schedule

The Truth About Estate Planning Fundamentals of Proper Planning

Cost: no charge
Time: 7:00 to 9:00 p.m.
Dates: 2/6/07 Tuesday
3/13/07 Tuesday
4/10/07 Tuesday



Registration: Contact Mary Lang at (847) 367-4460

For online information about Estate Planning,
please encourage your clients to visit us at
<http://eblawgroup.com>

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Wealth Strategies Planning

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Estate Planning • Estate & Trust Administration

Wills & Probate

Business Entity Formation & Compliance

We invite you also to visit <http://beaconbridge.com>
for resources on **Business Exit & Succession Planning**.