



THE ADVISOR

SUITE

A GLIMPSE INTO
PRINCIPLE-BASED MARKETING



**“YOU CAN NEVER RISE HIGHER
THAN YOUR FOUNDATION ALLOWS”**

HAVE YOU EVER NOTICED HOW COMPLICATED A CAR ENGINE IS? IF ALL THE PARTS DO NOT WORK TOGETHER CORRECTLY, IT WON'T RUN VERY WELL, IF AT ALL.

MARKETING TODAY HAS A SIMILAR DEGREE OF COMPLEXITY. YOUR WEBSITE, EMAILS, PAID ADS, SEO, SOCIAL MEDIA, BLOG, WEBINARS, AND SO ON ALL NEED TO BE WORKING TOGETHER CORRECTLY OR YOUR MARKETING ENGINE WON'T RUN VERY WELL.

IF YOU FOLLOW THE PRINCIPLES OF MARKETING, AND PRODUCE AUTHENTIC CONTENT, YOU INCREASE YOUR PROBABILITY OF SUCCESS.



“AUTHENTICITY OVER AMBIGUITY”

THE BEST MARKETING SITUATION FOR A FINANCIAL ADVISOR, MORE OFTEN THAN NOT, IS AN INTERNAL MARKETING TEAM.

WHEN YOU RELY ON YOUR CUSTODIAN OR FMO/IMO FOR WHITE-LABELED MATERIALS, YOU GIVE UP A PART OF YOUR AUTHENTICITY AND IDENTITY.

IF YOU DON'T WANT TO PAY FOR A COMPLETE INTERNAL MARKETING TEAM, OR IF YOU DON'T WANT TO BUILD IT OUT, OR IF YOU DON'T KNOW HOW TO BUILD IT OUT, **THEN CONSIDER INTEGRATING WITH THE ADVISOR SUITE.**



“ALWAYS BE GUIDED BY PRINCIPLES”

CONSIDER THE FOLLOWING PRINCIPLES
IN YOUR NEXT MARKETING CAMPAIGN:

THE PRINCIPLE OF CHANGE SUGGESTS
THAT UNLESS THE PAIN OF CHANGE
BECOMES LESS THAN THE PAIN OF
CONTINUING ON, INDIVIDUALS WILL
NOT CHANGE.

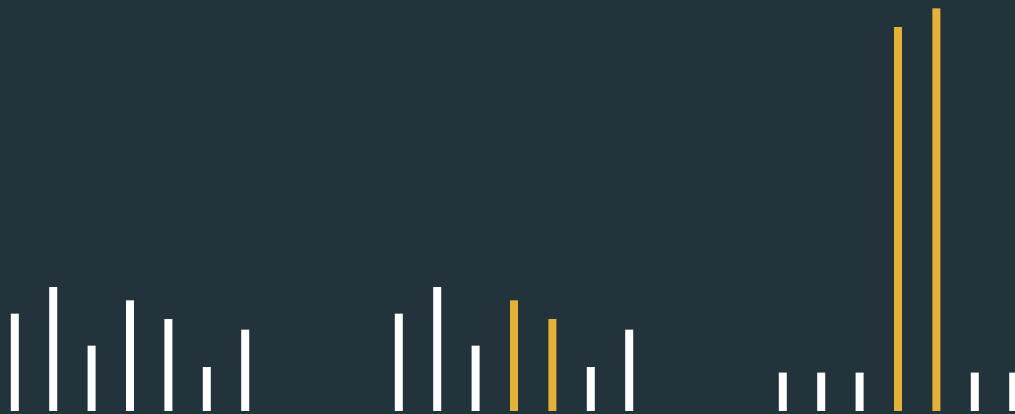
THE PRINCIPLE OF PERMISSION SUGGESTS
THAT UNLESS YOU ARE GIVEN
PERMISSION TO SPEAK, IT DOES NOT
MATTER HOW LOUD YOU ARE, THEY ARE
NOT LISTENING.

THE PRINCIPLE OF DIRECTION SUGGESTS
THAT UNLESS YOU CLEARLY EXPLAIN
WHAT YOU OFFER, WHAT IS EXPECTED,
AND WHAT THE NEXT STEPS ARE, THERE IS
A HIGH PROBABILITY THEY WILL NO ACT.



“INSTEAD OF ATTENTION SEEKING,
TRY VALUE OFFERING”

CONSIDER THE FOLLOWING AS YOU
DEVELOP YOUR MARKETING:



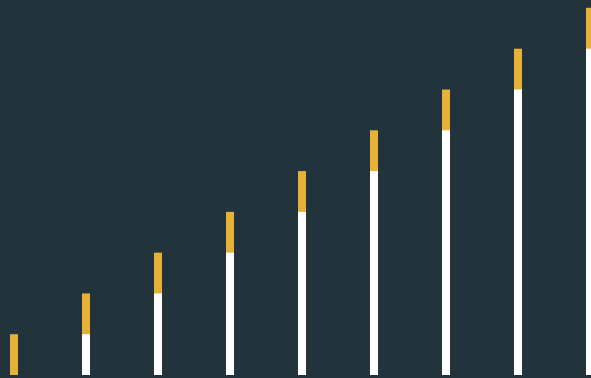
“REDUCE OPTIONS. INCREASE FOCUS.
MULTIPLY RESULTS”

-BEHAVIOR GAP
- VISUALIZE VALUE (GRAPHIC CONCEPT)



**“DELIBERATE DEVELOPMENT LEADS TO
DELIBERATE RESULTS”**

CONSIDER THE FOLLOWING IN YOUR
LONG-TERM PROJECTIONS:



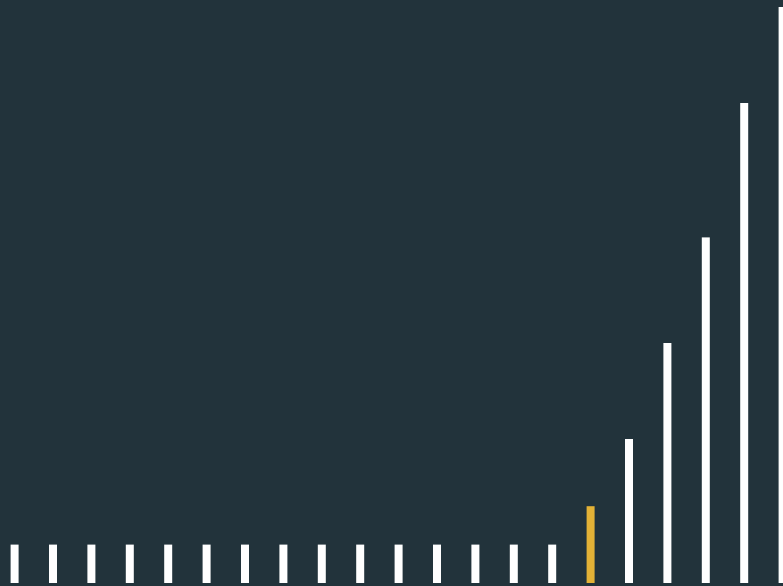
“I WAS THE SUM TOTAL OF THE OBSTACLES
I’D OVERCOME”

-DAVID GOGGINS
- VISUALIZE VALUE (GRAPHIC CONCEPT)



**“THERE ARE NO SILVER BULLETS IN MARKETING,
ONLY PRINCIPLES AND PERSEVERANCE”**

CONSIDER THE FOLLOWING WHEN YOU
YOU DON'T GET QUICK RESULTS:



“THE TIPPING POINT IS NOT A QUESTION
OF IF, BUT WHEN”

-JOHN FONTANELLA
- VISUALIZE VALUE (GRAPHIC CONCEPT)



“PLANT SEEDS, NOT SHINNY OBJECTS”

THE FOLLOWING ARE EXAMPLES OF
LEAD MAGNETS YOU CAN USE

ONLINE QUIZ*
EBOOK
CHECKLIST*
HOW-TO GUIDE
ONLINE COURSE*
ON-DEMAND WEBINAR
CHEATSHEET
TOOL KIT
RESOURCE LIST*
WORKBOOK
CALCULATOR
REPORT
NEWSLETTER

*OUR FAVORITES



“THE ONLY WAY TO HEAL IS
TO DEAL WITH THE PAIN”

THE MAIN SERVICES WE OFFER:

SUITE FUNNELS:

CREATE DIGITAL MARKETING FUNNELS THAT CAPTURE, NURTURE, AND CONVERT LEADS INTO APPOINTMENTS.

\$2,000 PER MONTH

MARKETING ESSENTIALS:

SIMPLIFY YOUR MARKETING SUPPORT BY BRINGING IT ALL UNDER ONE ROOF (WEBSITE, EMAIL, PODCAST, ETC).

\$3,000 PER MONTH

GO TO [THEADVISORSUITE.COM/OUR-SERVICES](https://theadvisorsuite.com/our-services) TO REVIEW OTHER SERVICES WE OFFER.



“OUR SCIENCE, PLUS OUR STRUCTURE,
PLUS **YOUR AUTHENTICITY**”

IF YOU WANT TO INTEGRATE WITH THE ADVISOR SUITE, THEN GO TO [THEADVISORSUITE.COM](https://theadvisorsuite.com) AND CLICK ON THE BUTTON THAT SAYS “**SCHEDULE A CALL**”.

THE PURPOSE OF THE CALL IS TO **REVIEW THE PRINCIPLES OF MARKETING**, UNDERSTAND **WHAT YOU WANT** FROM YOUR MARKETING EFFORTS, AND **DETERMINE IF IT MAKES SENSE TO INTEGRATE**, OR NOT.

WE LOOK FORWARD TO SPEAKING WITH YOU SOON.



THE ADVISOR
— SUITE —

ONE AGENCY. MULTIPLE LEAD SOURCES.
(801) 896-1234 | THEADVISORSUITE.COM



**“STOP ASKING PEOPLE TO MARRY YOU
ON THE FIRST DATE”**

HOW TO APPLY THE MARKETING PRINCIPLES TO A CAMPAIGN:

THE PRINCIPLE OF PERMISSION

STEP 1: RAISE AWARENESS OF VALUE OFFERED

STEP 2: EXCHANGE VALUE FOR AN EMAIL, COOKIE, OR OTHER SOURCE OF DATA

STEP 3: COLLECT DATA AND DETERMINE WHAT IS WANTED

THE PRINCIPLE OF DIRECTION

STEP 4: OFFER A PRODUCT OR SERVICE BASED ON WHAT IS WANTED

STEP 5: SET EXPECTATIONS

STEP 6: DESCRIBE NEXT STEPS AND INVITE THEM TO TAKE ACTION