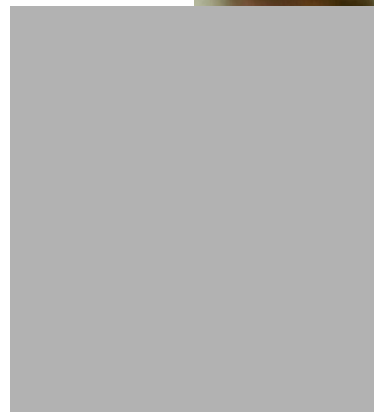




# Welcome to Evergreen

Empowering You to Make and Deepen Connections



# Client Experience

Core Philosophy |  
Building Your Strategy |  
Content Creation |  
Lead Capture

# Here to Help



## Daniel Keever

Daniel serves clients as a chief marketing strategist, guiding the direction and overall execution of your project.

## Melissa Ellis

Melissa is our project manager because of her love for detail and ability to keep projects on track. She's available to you for your questions as well.





# Evergreen Philosophy

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Growing relationships rich in trust.





# Evergreen Philosophy

## THE TRUTH

The lifeblood of your business is relationships. You built your success up to this point on trust, referrals, and excellent service. Every time you sit down with a client or prospect, you build deeper connections and strengthen your business.

## THE PROBLEM

Most advisor marketing scrubs you of your most valuable asset: you. As a result, you get little to no results for your investment. Why is that? We believe it is because your marketing has lost sight of your key differentiator.



# Evergreen Philosophy

## THE ANSWER

Your clients don't just choose or refer "a" financial advisor. They choose and refer YOU.

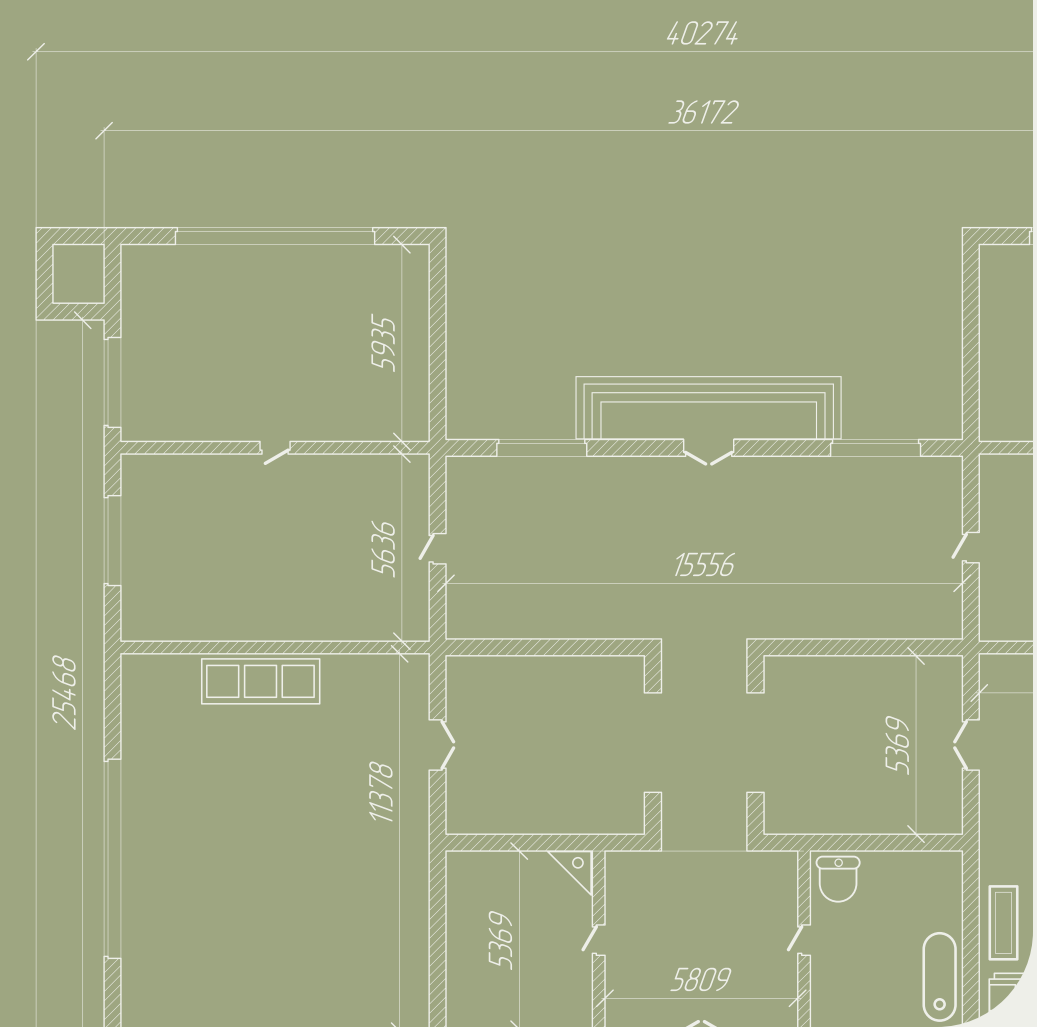
That's why we have perpetually sought to reimagine advisor marketing with your face, voice, and power of connection at the center.

The best marketing partner for a financial advisor doesn't "resemble" your voice. We amplify it.

*(without tying up your schedule)*

Our Blueprint  
for Success

Client Retention & Acquisition



Retention — Expansion

**Building a deeper and broader  
client base depends on two  
things: trust and value.**



# Client Retention

## GOAL 1: ROCK SOLID RETENTION

Retention is a non-negotiable priority for advisor marketing. We create a consistent, proactive strategy that helps you add value and build trust with your clients. This approach is video-centric with an additional emphasis on digital resources and events.

## GOAL 2: ACTIVATING REFERRALS

Even your happiest clients may find referrals difficult. We find that creating invitation opportunities is a key way to help activate them as referral sources. (i.e. webinars, eBooks, checklists, etc.)

# Client Expansion

## GOAL 1: AUDIENCE EXPANSION

We create a clear plan of action to keep adding ideal clients to your audience. This usually looks like a combination of content marketing, digital advertising, and a COI engagement strategy.

## GOAL 2: CAPTURE AND NURTURE LEADS

The #1 source of new client growth we see comes from nurturing leads who gave you their email. That's why our second stage needs a successful set of lead magnets that offer meaningful value in exchange for a nurturing opportunity.

## GOAL 3: WINNING CONVERSIONS

We provide clear, valuable opportunities for them to become formal prospects. We create the strategy and structure that invites your audience to work with you. Success at this stage looks like prospects scheduling their first call on autopilot.

## STAGE 1: AUDIENCE EXPANSION

### **CONTENT**

Create impactful organic content (social media – video, graphics, and copywriting)

### **OUTREACH & ENGAGEMENT**

Proactively engage on other profiles. Leverage targeted outreach tools like digital ads or LinkedIn Navigator).

### **COI CROSS-PROMOTION**

Create content with other COIs and cross-promote to your audiences.

## STAGE 2: LEAD CAPTURE AND NURTURE

### **LEAD MAGNETS**

Create high-quality lead magnets that showcase your value and expertise.

### **LEAD CAPTURE**

Establish a measurable promotion strategy to drive traffic (including easy referral opportunities)

### **EMAIL NURTURING**

Create automated welcoming sequences to build trust and increase conversions on autopilot.

## STAGE 3: PROSPECT CONVERSIONS

### **PROSPECT EMAIL LIST**

We aim for a bi-weekly prospect-focused email to keep your audience engaged after the first welcome sequence.

### **CREATIVE TOUCH POINTS**

Establish a cadence of value-adding touch points that build trust and familiarity. We prefer a combination of webinars, e-resources, and personal touch.

## Creating Strategies

Our strategy model revolves around 2 questions:

- How do we capture **content**?
- How do we capture **leads**?

# Our Base Offer Model

\$2,000 per month

## CONTENT: MONTHLY INTERVIEW

Maximize your impact while minimizing the time required. Invest 30 minutes per month into an interview session and let our team do the rest.

## LEAD CAPTURE: QUARTERLY CAMPAIGNS

We offer one included campaign each quarter, giving us the ability to build a steady “portfolio” of lead capture assets.

## A-la-carte Resources

### CONTENT DAYS

**Starting a \$2,500 per project.**

These can be added to your scope as desired. These are ideal for teams that want to showcase multiple leaders or advisors.

### PODCASTING

**Starting a \$1,000 per month.**

These can be added to your scope as desired. These are ideal for teams that want to showcase multiple leaders or advisors.

### CAMPAIGNS

**Starting at \$1,000 per project.**

Some brands benefit from more aggressive growth strategies. Our team can create campaigns on-demand to meet your goals.

# The Power of Personal Brands

## LEVERAGING PERSONAL BRANDS

To maximize the power of your personal network, we also work with advisors and leaders to create compelling personal brands.

**Every scope comes with one personal brand (strategy, content creation, and distribution) because we believe in their power. This can be shared between advisors month to month.**

For organizations that want to empower additional advisors to grow their book of business, personal brand strategies can be added to your scope. Each addition includes:

- Brand Strategy
- An additional 30 minute interview
- Video, article, and social media versions of all content created
- Scheduling of up to 3 posts per week

**Investment: \$500/month per additional brand**



# We'll Handle the Heavy Lifting



## CONTENT PLANNING

Our team will guide your strategy regarding topics, campaigns, and action items. After our monthly strategy call, our team will handle the execution needed.



## POSTING & SENDING

As we create content from our interviews, our team will handle all social media scheduling and email sending.



## PERFORMANCE TRACKING

We will provide bi-weekly analysis of the performance data and provide a summary of key observations in easy-to-understand language.



# Committed to You



## PERFORMANCE REPORTING

You always have access to a live dashboard that shows you how we are doing. We add our commentary every two weeks to help provide clarity on what the data is showing.



## WEEKLY CHECK INS

You'll get an email from us every Monday sharing project updates and progress.



## MONTHLY STRATEGY CALLS

We will schedule a call with you each month to touch base on strategy goals, performance metrics, and invite your feedback for our team.





# Content Creation

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The Lifeblood of Your Brand



Our Foundational Question —

**How do we capture YOUR  
presence and expertise while  
minimally consuming your time?**

## Option 1

# Monthly Interview

**Our standard model for Virtual CMO clients.** Create a month worth of content in 30 minutes. Here's how it works:

## Virtual Recording

Each month, we will provide you with timely prompts in line with your marketing strategy. A team member will interview you in our digital studio, providing you with a comfortable, dialogue-driven approach to video content.

## Content Creation

Our team will then extract the best sections of the recording to create video, article, social, and email content. Final campaigns will be sent to you for approval before distribution.

## Upgrade Your Video?

If needed, we'll send you new video, audio, and lighting for your interview space to create a higher quality video product.

You can increase your time as needed at a rate of \$100 per 30 minutes. This is more common for firms who want more than one person involved on camera.

We have a full in-house production team, but we can also collaborate with local teams depending on travel.

## Option 2

# Quarterly Content Day

**Starting at \$2,500 per project.** For brands who value premium production quality, we offer half-day video sessions where we plan and record professional video content to give you 3-4 months worth of exceptional content.

## Strategic Planning

We work with your team to plan out the marketing focuses you'll have over the next 3 months. You'll receive a list of topics and prompts that we will use on the filming day.

## Professional Filming

Enjoy an interview-style format where you share your most impactful stories, reflections, and insights. You may also break up your time and have multiple speakers from your firm or special guests.

## Quarterly Content

A single 4-hour film day gives us video and written content for the quarter to drive your strategy. Our team will take care of all editing and production. All you need to do is sign off on finished products before distribution.

Option 3

# Podcast Marketing

**Starting at \$1,000 per month.** Podcasts are a powerful tool for building community. They are also a vehicle to help you access other leaders and COIs. We help plan, launch, and grow podcasts as a central part of your content strategy.

## Planning + Strategy

The key to a successful podcast is a clear value proposition for your listeners. We help you identify and align your podcast strategy to resonate with your ideal audience.

## Launch + Production

From your initial branding and launch to growing production, our team oversees the entire process. Your role? Have interesting conversations with interesting people. We support audio-only or video-first models.

## Podcast Marketing

Having a podcast is not the same thing as growing your podcast. Our team integrates your podcast into your big-picture strategy to help drive your most important marketing objectives.





# Lead Capture

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The Key to Client Acquisition



Key Marketing Truth

**You don't go fishing without hooks unless you expect fish to jump in the boat. Your marketing needs the right lures too.**

# A-la-carte Campaigns

Starting at \$1,000 per project  
beyond your standard quarterly campaign

Some campaigns may include additional  
recommended advertising budgets

## CREATIVE ASSETS

We plan and produce all creative assets needed for your campaign to be successful – like lead magnets, graphic design, video production, and landing pages. Any campaign we build for you will be fully supported with compelling creative assets.

## LEAD NURTURING

How do you get a new lead to become a new client? Every campaign we build includes a 5-email nurturing sequence designed to maximize qualified discovery calls for you.

## CLEAR REPORTING

Know with certainty how your campaign is doing at every benchmark. Our live dashboards share how your funnel is performing, and our team performs weekly optimizations to improve performance.



# Lead Magnet Sample



# Lead Magnet Sample

## Unwinding a Concentrated Stock Position

Is Your Wealth Tied Up in a Concentrated Stock Position?

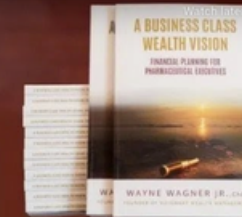
UNWINDING A CONCENTRATED STOCK POSITION

A chapter from "A Business Class Wealth Vision"




 VIZIONARY  
WEALTH MANAGEMENT

How to Unwind a Concentrated Stock Position



Free e-Chapter

UNWINDING A  
CONCENTRATED  
STOCK POSITION

Watch on  YouTube

# We're dedicated to your success.

Everything we do is to help you succeed. If you have ideas or questions about how we're moving your strategy forward, you are *always* invited to knock on our door.

Evergreen