Welcome to Evergreen

Become more Visible, Valuable, and Connected

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

Growing relationships rich in trust.

Evergreen Philosophy

THE TRUTH

Relationships are the lifeblood of your business. Your success up to this point is built on trust, referrals, and excellent service. Every time you sit down with one of your advisors or a prospect, you build deeper connections and strengthen your business.

THE PROBLEM

Most financial marketing scrubs you of your most valuable asset: your thought leadership. 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.

Eg

Evergreen Philosophy

THE ANSWER

Your advisors don’t just choose or refer “a” firm to partner with. They choose and refer YOU.

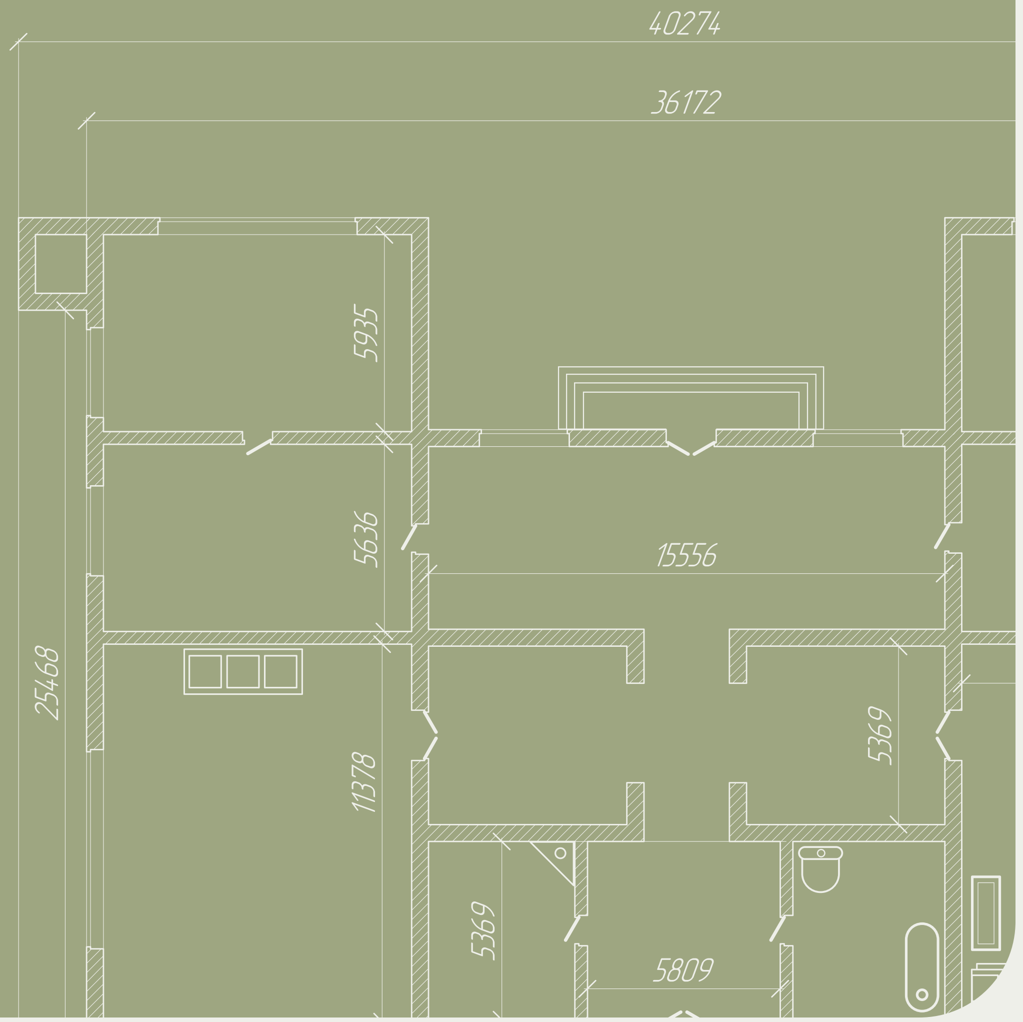
That’s why we have perpetually sought to re-imagine financial marketing with your faces, voices, and power of connection at the center.

The best marketing partner for you doesn’t “resemble” your voice. They amplify it.

Eg

Our Blueprint for Success

Customer Retention & Acquisition



Retention — Expansion

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

EVER GREEN

Customer Retention

GOAL 1: ROCK SOLID RETENTION

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

GOAL 2: ACTIVATING REFERRALS

Even your happiest customers 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.)

Customer Expansion

GOAL 1: AUDIENCE EXPANSION

We create a clear plan of action to keep adding ideal prospects 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 customer acquisition 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 first-call 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: EXPAND YOUR AUDIENCE

Clients – Referrals – New

STAGE 2: ENGAGE YOUR AUDIENCE

Content – Lead Capture

STAGE 3: CONVERT YOUR AUDIENCE

Email Nurturing – CTA

STAGE 1: EXPAND YOUR AUDIENCE

CLIENT FOCUSED
Your best advocates are your current clients. We want to increase their connection with digital platforms and give them opportunities to share your content.

TARGETED OUTREACH
We often will leverage targeted digital campaigns when we can identify communities of your ideal prospects.

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

STAGE 2: ENGAGE YOUR AUDIENCE

CONTENT
Create engagement-focused content (social media – video, graphics, and copywriting) to share with your audience

LEAD MAGNETS
Create high-quality lead magnets that showcase your value and expertise. We heavily target these towards clients because of their shareable nature.

We share these assets in exchange for contact information.

STAGE 3: CONVERT YOUR AUDIENCE

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

CONTINUING 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 by your team.

Creating Your Solution

Our approach to marketing for firm-level clients provides more customization to meet your needs. Here are a few of the ways:

Full Customization

Our RIAs, FMOs, and firm-level clients often have more unique needs than financial advisors. That's why we build you a fully customized scope. Use us as a specialized strategic partner in a way that complements your existing strategy.

B2C + B2B Strategies

Many firms need separate (but integrated) marketing strategies for B2C growth as well as recruitment for new advisors.

Our team can help you with either focus – or both! We are immersed in the advisor world and are equipped to help you develop focused recruiting campaigns to attract new talent.

Advisor Marketing

The best firms help equip their advisors to grow their businesses. We have wholesale-level solutions that you can deliver to your client base as a value-added service.

If you want your advisors to have stronger marketing and better represent your community, this is a powerful option.

Fully Outsourced Marketing Support

If you're looking for a robust, external marketing team to drive your strategy, this is what our process looks like.

Full Service Strategies

$3,250 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.

MONTHLY CAMPAIGNS

We offer one included campaign each month, giving us the ability to build a steady “portfolio” of assets to generate leads and engage your current advisor community.

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 transferred between leaders from month to month.

For organizations that want to empower additional leaders to grow their impact, 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.

Eg

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.

Eg

Content Creation

The Lifeblood of Your Brand

Our Foundational Question —

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

You can increase your time as needed at a rate of $250 per 30 minute interview. This is more common for firms who want more than one person involved on camera.

Option 1

Monthly Interview

Our standard model for Virtual CMO clients. Create a month worth of content in 30 minutes. In your base offer, you get two interviews per month. 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.

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

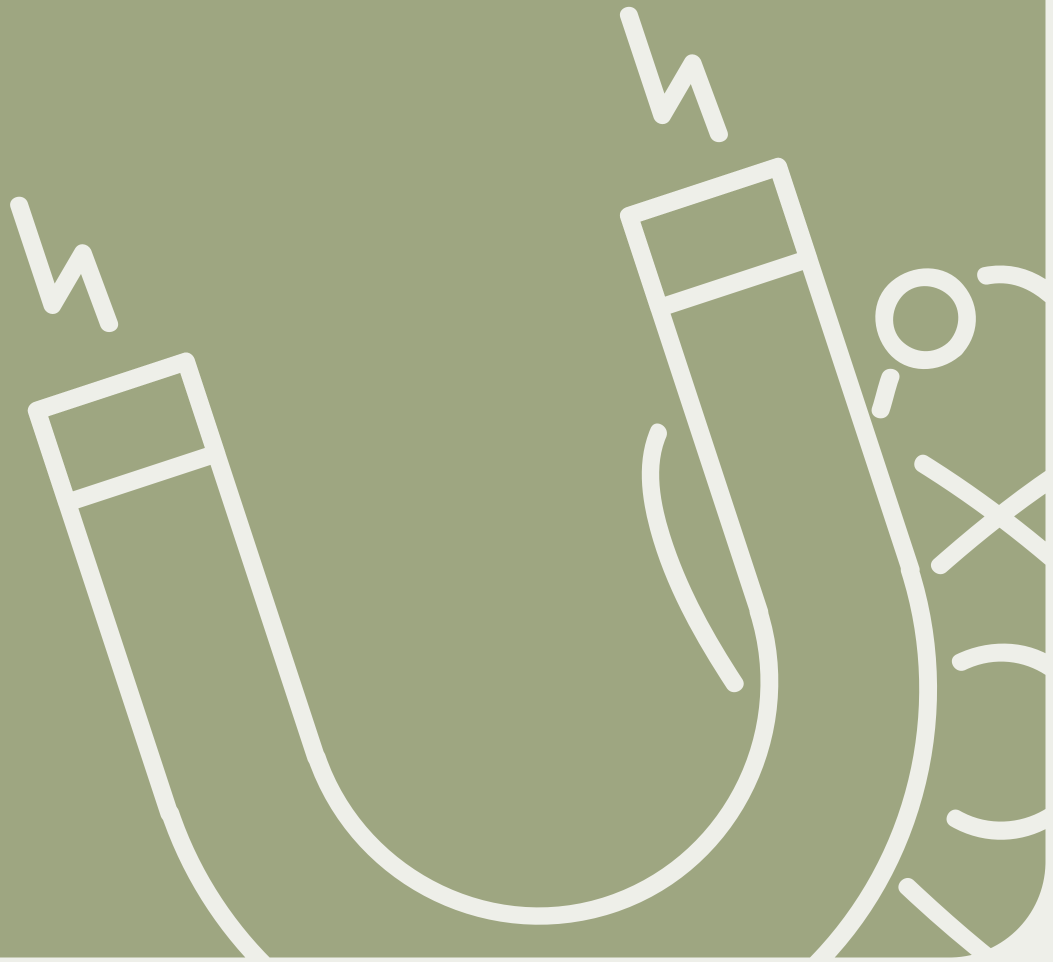
From your initial branding and launch to growing production, our team oversees the entire process. Your role? Have interesting conversations with interesting people. We support audio-only or video-first models.

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

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.

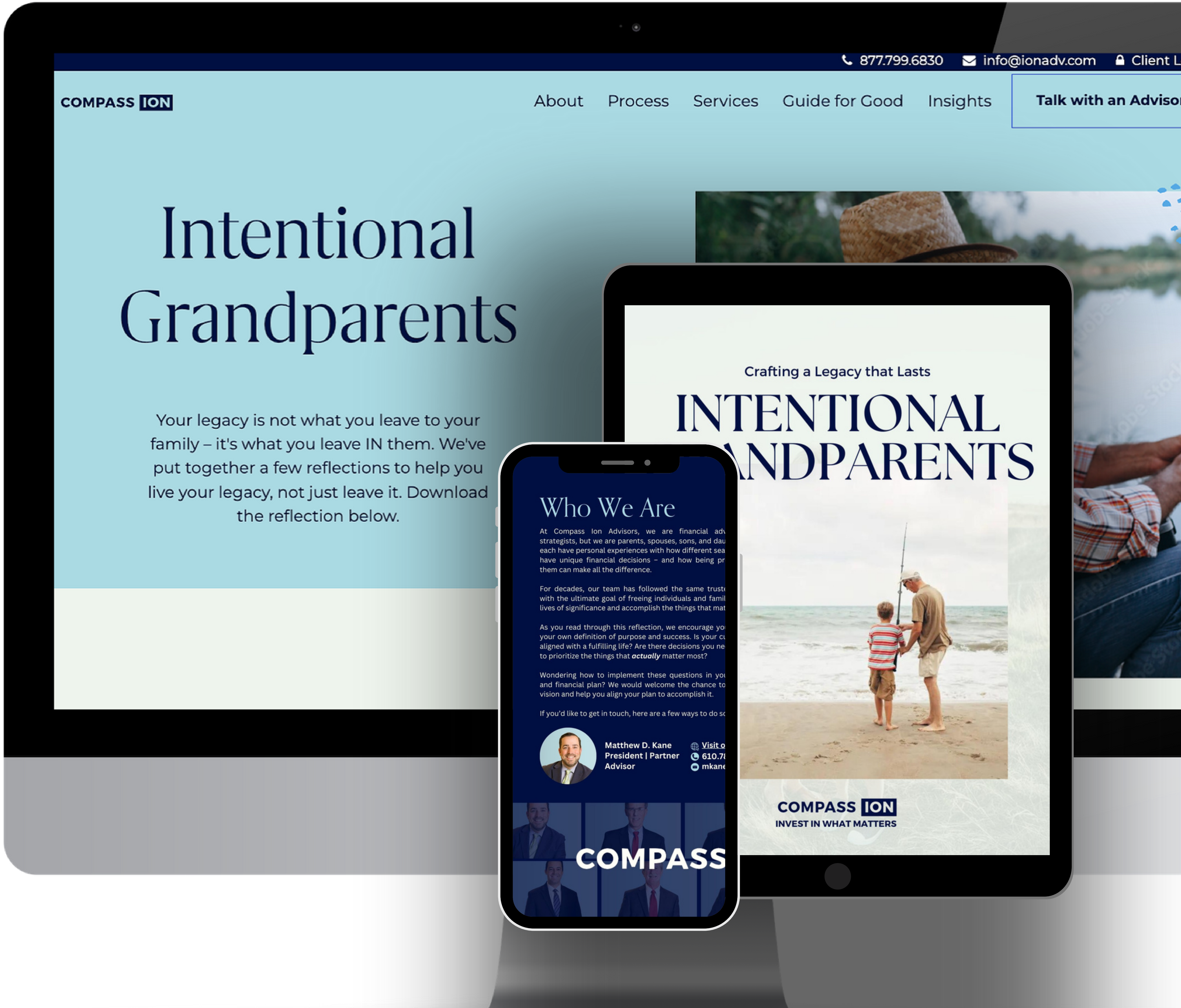
LEAD NURTURING

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

Lead Magnet Sample

Lead Magnet Sample

Lead Magnet Sample

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