

# Financial Services Marketing Plan

Sustainable relevance starts with a plan. Financial professionals with a defined marketing strategy acquire more clients and have greater confidence in achieving their business goals. Leverage this template to craft an actionable marketing strategy that sets you up for success – no matter what comes your way.

**Marketing Objectives** – What you want to accomplish through your marketing

**Target Market** – Who you want to attract through your marketing

**Positioning & Core Messaging** – How you will communicate your value proposition and mission statement

## Marketing Plan – How you will accomplish your objectives

Channels/Tactics	Technologies/Platforms	Frequency	Dates	Core Content & Messaging	Budget	Metrics
Website					Content:  Activation:	Visits Form Fills
Social Media — Organic					Content:  Activation:	Impressions Engagements
Social Media — Paid					Content:  Activation:	Impressions Engagements
Email					Content:  Activation:	Opens Clicks Unsubscribes

Channels/Tactics	Technologies/Platforms	Frequency	Dates	Core Content & Messaging	Budget	Metrics
SEM — Business Listings					Content:  Activation:	Clicks Phone Calls
SEM — Paid Search					Content:  Activation:	Clicks Phone Calls
Digital Advertising					Content:  Activation:	Impressions Clicks
Retargeting Ads					Content:  Activation:	Impressions Clicks

Channels/Tactics	Technologies/Platforms	Frequency	Dates	Core Content & Messaging	Budget	Metrics
eNewsletters					Content:  Activation:	Opens Clicks Unsubscribes
Webinars					Content:  Activation:	Registrations Attendees
In-Person Events					Content:  Activation:	Registrations Attendees
Print Newsletter					Content:  Activation:	Calls Appointments

Channels/Tactics	Technologies/Platforms	Frequency	Dates	Core Content & Messaging	Budget	Metrics
Direct Mail					Content:  Activation:	Calls Appointments
Print Advertising					Content:  Activation:	Calls Appointments
Radio/TV Advertising					Content:  Activation:	Calls Appointments
Public Relations					Content:  Activation:	Media Coverage

Channels/Tactics	Technologies/Platforms	Frequency	Dates	Core Content & Messaging	Budget	Metrics
					Content:  Activation:	
					Content:  Activation:	
					Content:  Activation:	
					Content:  Activation:	

## When challenges arise, you can reinvent your strategy – and succeed.

The unprecedented challenges currently facing wealth management have revealed opportunities for all financial professionals to improve their marketing efforts.

Effective marketing requires a defined strategy and can be achieved with the right support. Broadridge delivers the tools and strategies financial professionals and clients need to bridge the gap between digital and in-person—and will remain your trusted partner every step of the way.

## Learn how you can tap into a wealth of proven resources and expertise.

Contact Broadridge Advisor Solutions

Call +1 800 233 2834

Or email [advisorsolutions@broadridge.com](mailto:advisorsolutions@broadridge.com)

To learn more, visit [broadridge.com/advisor](https://broadridge.com/advisor)

