



Fall Marketing Starts Today

By Kristen Luke

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In just a few days, clients will begin to head to their summer homes or favorite vacation destinations. The phone won't ring as often and you won't receive as many emails.

If this sounds like your business, you aren't alone.

Advisory businesses slow down during the summer months as clients and prospects have other priorities on their minds.

This slowdown provides an excellent opportunity to focus more energy on marketing and planning for the fall. Here are three things to work on to prepare for September and the fourth quarter.

Plan for workshops and events

If you would like to host a public workshop or a client appreciation event, September and October are excellent months to do this. But to accomplish this the planning should start now. An event can take two to three months to organize, especially if this is the first time you are hosting the event. To host a mid-September event, planning should begin in mid-June (in other words, now!).

Contact centers of influence (COIs)

Most likely, the majority of your COIs are in their slow season as well. The summer months provide an excellent opportunity to schedule meetings, lunches or other COI-targeted marketing campaigns to either develop or deepen COI relationships. Take this opportunity to not only build your relationships but also discuss opportunities for joint marketing in the fall.

Update collateral and website

When was the last time you reviewed your marketing collateral and website? You'll probably find that information is out of date. Spend a couple of hours reviewing and updating your communication materials as necessary. This will help ensure all information you are communicating to prospects is accurate when business picks up in the fall.



This summer, in addition to enjoying some time off, spend some time focusing on your marketing. It will put you in a better position to take advantage of the opportunities fall has to offer.

Kristen Luke is the Principal of Wealth Management Marketing, Inc., a firm dedicated to providing marketing strategies and support for Registered Investment Advisory firms. Her firm enables independent advisors the ability to market with the same quality and consistency as their larger competitors by providing the resources of an entire marketing department at a fraction of the cost of a single employee. For more information, visit www.wealthmanagementmarketing.net.

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