



Are You Ready to Grow Your Marketing?

Competing for new clients in today's competitive environment demands that you have the best marketing and digital presence for your practice. At Sage Marketing we understand your business and the challenges you may face in communicating with your current clients, and also in attracting new relationships. As a client of Sage Marketing you will have access to the leading communications platform in the industry—combined with a dedicated Relationship Manager to provide you with customized support as you implement your growth strategy.

Our team brings deep experience in creating best-in-class marketing and communication tools that help you not only build a brand—but grow your firm.

Branding And Communications For A Seamless Experience

At Sage Marketing, every advisor we serve will have a dedicated Relationship Manager guiding and supporting them.

We're here to help you:

- Meet your business goals
- Implement your client/prospect communications and systems
- Put resources in place that will help grow your firm

If you're looking to continue to grow your practice it is essential to have the best communication tools at your disposal. You should focus on what you do best as you work with clients and prospects. We can help you create an experience that differentiates you in your local market as you work to attract new clients.

Take Your Marketing to the Next Level

Sage Marketing has a comprehensive platform to help you communicate better with clients and prospects, and will also help to automate your marketing programs. Every advisor has access to a dedicated Relationship Manager to help set up and execute all of your marketing!



Branding Development

- New branding and logo review
- Branded website with custom content that includes: firm details, polished team bios, financial planning and investment process descriptions, relevant client content, and client account access (we are providing this with our exclusive partnership with Advisor Websites)
- Business cards and letterhead design
- Completed designs for additional firm branded materials



Communications Support

- For transitioning advisors - Personalized communications for clients announcing your new firm
- Updated social media profiles for Facebook, LinkedIn, YouTube, etc.
- Communications integrated with Redtail and Salesforce
- Social media content posts with publishing tool to help schedule updates
- Email system fully integrated to publish all of your client communications and linked to your compliance system
- Fully automated prospect communications and drip campaigns



Business Development & Relationship Management

- Complete library of compliance-reviewed materials: customized letters, postcards, birthday cards, invitations to events, client educational materials, market updates (weekly, monthly, quarterly), white papers, newsletters (provided through our exclusive partnership with MarketingPro)
- Deep practice management resources: client-meeting agendas, onboarding best practices, training staff for effective client interactions, etc.
- Modern digital strategies specifically designed for capturing leads in today's business environment

READY TO LEARN MORE?

We're here to help you seize the opportunities
awaiting to grow your practice!



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