



WELLINGTON
Investment Advisors

Digital Marketing PLAN

October 2021

Being Radically Relevant

- Who (is your target): Pre-retirees, university faculty
- What (do you do for them):
 - Build personalized portfolios for each client.
 - Use individual stocks (not ETFs).
 - Guide them through the retirement process (such as how to roll money over from an IRA to a qualified retirement account as well as how to access their money after retirement).
- How (do you engage with your target): Provide them with valuable resources and insights on their challenges and remove barriers for them to take next steps.
- Where (those targets spend time): Search (SEO optimized), social media & email.
- When (will you engage with them): See monthly marketing calendar and social media.

Your Marketing Content Calendar

October 2021

Why I Became a
Financial Planner

November 2021

4 Popular Myths
About Financial
Planning

December 2021

Why You Should
Not Delay Planning
for Retirement

January 2022

3 Key Retirement
Planning
Challenges of
College Faculty

February 2022

What to Do if the
Market Loses Value

March 2022

Do You Know What
Your Investment
Statements Are
Telling You?

April 2022

Case Studies of
Clients I've Helped

May 2022

Does a "Second
Career" After
Retirement Make
Sense for You?

June 2022

What We Do and
How We Help

July 2022

The Meaning of a
Fiduciary
Relationship and
Why it Matters

August 2022

4 Stages of
Retirement
Planning and a
Strategy for Each

September 2022

See a Sample
Financial Plan

Your New Bio

About Paul

Paul Bullock is CEO of Wellington Investment Advisors, an independent, boutique fiduciary firm serving pre-retirees and university faculty across Indiana. With over 32 years of financial experience, Paul is committed to building long-term relationships through thoughtful, personalized investment advice and guidance. He focuses on a disciplined tactical asset allocation approach to money management through a strong understanding of economic and market conditions and strives to build trust with clients by providing sound guidance. Paul understands the hard work his clients have put in to arrive at where they are today and wants to see them succeed in their goals for the future. Paul graduated from the University of Texas with an MBA, as well as a bachelor's degree in finance, and has been dedicated to assisting clients with their financial needs ever since. When he is not working, Paul enjoys time with his family and is also an avid equestrian polo player who helps raise money for over 18 different charities through his playing. To learn more about Paul, connect with him on [LinkedIn](#).

Facebook Before & After



**Wellington Investment
Advisors**

@WellingtonInvestmentAdvisors · Financial Planner

Sign Up

wellingtoninvestmentadvisors.com

Home Reviews Videos Photos More ▾

Like

Message



Wellington Investment Advisors

@WellingtonInvestmentAdvisors · Financial Planner

Edit Contact Us

Home About Photos Videos More ▾

Promote



Help more people discover the website for your Page by promoting it.

Promote Website



Manage your Page and Instagram account together with Business Suite.

Go to Business Suite

Create Ad

How would you like to grow your business?

See all

Create New Ad
Make an ad using text, photos or videos to promote your business.

Boost a Post

Automated Ads
Get personalized ads that adjust over time to help you get better results.

Free Facebook Business Tools

Create Post

Photo/Video

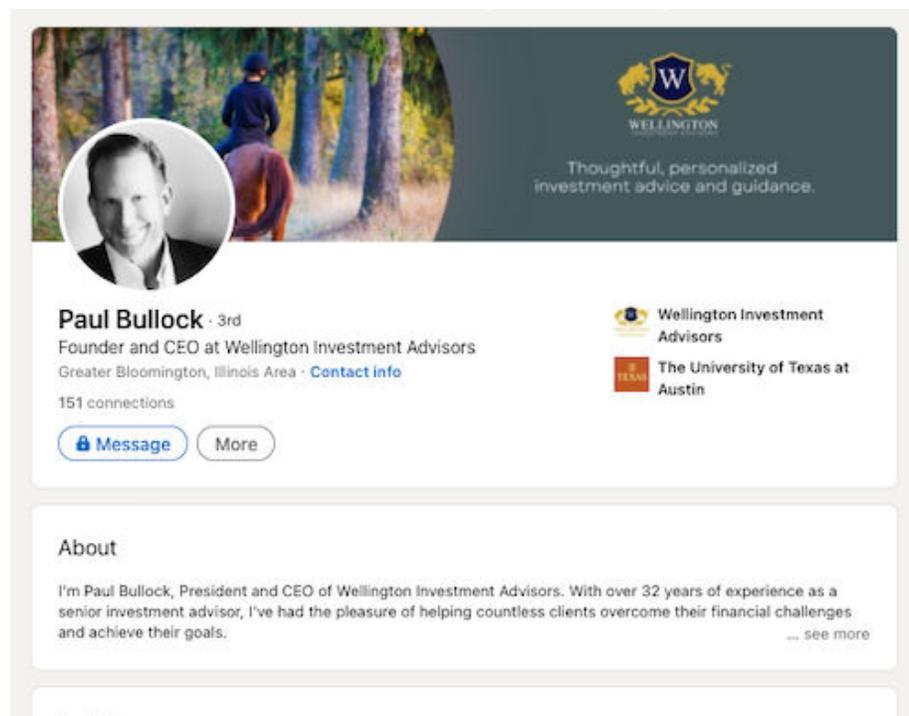
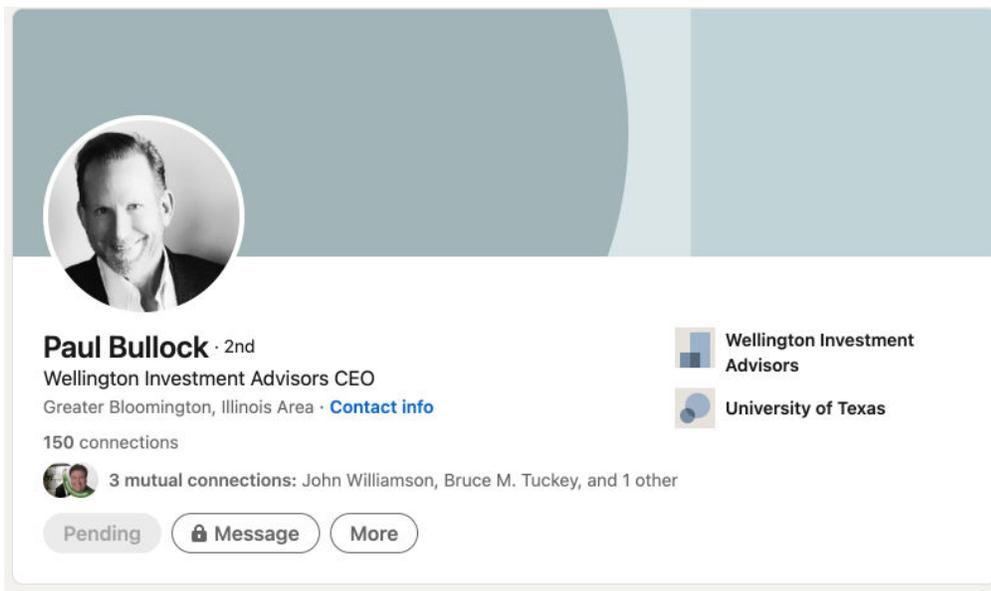
Feeling/Activity

Create Live Event Job Offer Ad

Wellington Investment Advisors updated their cover photo. Published by Paul Bullock · September 28 at 12:45 PM

We want to help you & your family thrive financially. To learn more, please visit <https://wellingtoninvestmentadvisors.com/>

LinkedIn Before & After



Twitter

New

← **Wellington Investment Advisors**
0 Tweets



Thoughtful, personalized investment advice and guidance.
wellingtoninvestmentadvisors.com

 **Wellington Investment Advisors**
@Wellington_Inv

We are a group of independent financial advisors bringing you thoughtful, personalized investment advice and guidance.

📍 Bloomington, IN [wellingtoninvestmentadvisors.com](https://www.wellingtoninvestmentadvisors.com)
📅 Joined September 2021

0 Following 0 Followers

Tweets Tweets & replies Media Likes

Mailchimp Email Template



Why I Became a Financial Advisor



This is a draft of your email template. Here we will feature a few sentences of teaser text from your newest blog post. We will choose a dynamic, attention-grabbing fact, question, or detail, then entice your readers with a call to action, attracting your valued clients and subscribers to [Continue Reading ...](#)

[READ MORE](#)



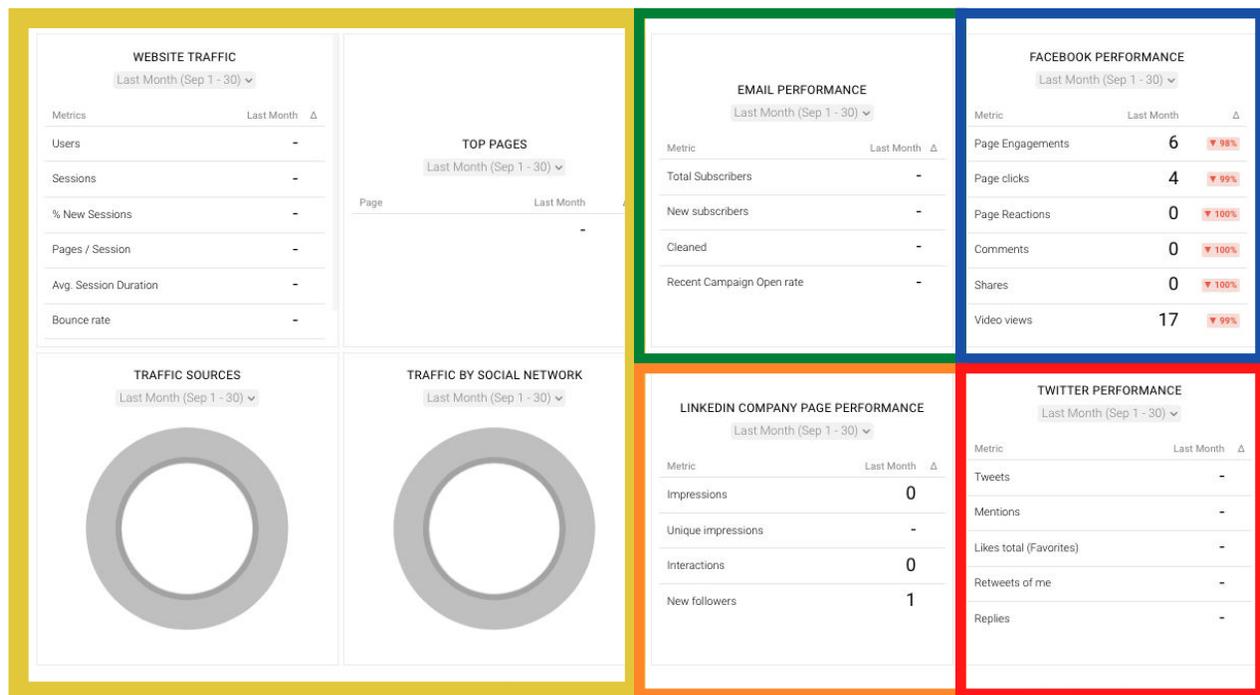
Paul Bullock
Founder and CEO

Paul is the Founder and CEO of Wellington Investment Advisors, and has over 32 years of experience as a senior investment advisor. He has had the pleasure of helping countless clients overcome their financial challenges and achieve their goals. Paul has an MBA and a degree in finance from the University of Texas.



Metrics to Watch

You will receive a monthly report from us with your marketing metrics.
This is your current snapshot before your account is active.



How to Read Your Data Metrics:

Website Data

Email Data

Facebook Data

LinkedIn Data

Twitter Data

*Sample shown has limited data due to most data sources not existing before now.

Your Marketing Goals

- Grow prospects.
- Have prospects watch a testimonial video on the website and schedule a meeting.
- Educate current clients.

Upcoming Marketing Checkpoints

3-Month Actions

6-Month Check-In

12-Month Metrics Meeting

Indigo Marketing Agency Contacts

Onboarding Optimization Manager:
service@indigomarketingagency.com

Your Account Manager:
emily@indigomarketingagency.com

Submit a Support Ticket:
<https://indigomarketingagency.com/new-ticket/>