

Total Marketing Package

Our done-for-you marketing solutions make it even easier to stay top-of-mind, grow your business, and maximize ROI with any budget.

Custom

YOUR COMPETITIVE EDGE

A fully personalized marketing solution designed to meet your firm's unique goals and challenges.

This package is ideal for advisors who require a customized approach beyond our standard offerings. To explore how we can develop a marketing solution tailored specifically to your needs, please [contact us](#) for a custom proposal.

STARTING AT
\$5,000
NO CONTRACT

Growth

MORE QUALIFIED LEADS

Unlock the power of lead-generation funnels and cohesive marketing strategy to drive qualified lead traffic and seize every opportunity.

STARTING AT
\$3,000
MONTHLY
\$5,000 SETUP
NO CONTRACT

- Everything in Stand Out Tier
- Appointment Lead Funnel
- Lead Magnet Funnel
- 2x a Month Calls With Team
- Ongoing SEO
- Ad Creatives and Management for One Platform (Google, Facebook, LinkedIn, YouTube)

MOST
POPULAR!

Stand Out

INCREASE REFERRALS

Elevate your industry authority effortlessly with expertly deployed custom content, boosting referrals and establishing you as the go-to expert.

STARTING AT
\$1,450
MONTHLY
\$4,000 SETUP
NO CONTRACT

- Custom Articles in Your Voice
- Swap Any Monthly Article for Custom Video Script, Editing, & Deployment
- Search Engine Optimization (SEO) & Answer Engine Optimization (AEO)
- Branded Email & Social Marketing
- Automated Welcome Series
- Calendar Integration
- 12-Month Content Calendar
- Monthly Personalized Article & Distribution
- 1 Weekly Custom Social Media Post
- Monthly Marketing Metrics
- Dedicated Account Manager

Compare Plans And Features

MARKETING FOUNDATIONS	MOST POPULAR!	
	GROWTH	STAND OUT
Kick-Off Strategy Consultation	✓	✓
Social Media & Branding Optimization & Setup	✓	✓
Search Engine Optimization (SEO) & Answer Engine Optimization (AEO)	✓	✓
Email Marketing Branding & Setup	✓	✓
Automated Newsletter Sign-up Welcome Series Emails	✓	✓
Website Audit	✓	✓
Website Calendar Integration	✓	✓
12-Month Marketing Calendar	✓	✓
Appointment Funnel:	✓	
• Appointment Landing Page	✓	
• Thank You Page With Calendar Booking	✓	
• Follow-up Appointment Emails	✓	
• Follow-up Appointment Reminder Texts	✓	
Lead Magnet Funnel:	✓	
• Lead Magnet Landing Page	✓	
• Thank You for Downloading Page	✓	
• Downloadable Lead Magnet: White Paper, Report, E-Guide, Checklist	✓	
• Conversion Email Drip Campaign	✓	

MONTHLY BENEFITS	MOST POPULAR!	
	GROWTH	STAND OUT
Dedicated Account Manager to Keep You on Track	✓	✓
Monthly Marketing Metrics	✓	✓
Monthly Article or Video (1): Fully Custom & Tailored to Your Brand's Voice, Capturing Ideal Clients' Attention	✓	✓
Optimization & Distribution of Article via Website Blog, Email, Social, GBP, and Wealthtender (if Subscriber)	✓	✓
1 Weekly Custom Social Media Post	✓	✓
2x a Month Calls With Team	✓	
Ongoing SEO	✓	
Ad Creatives and Management for One Platform (Google, Facebook, LinkedIn, YouTube)*	✓	

*Ads – Client must agree to a minimum of \$1k ad spend per month per platform.

*Additional platforms or LinkedIn campaigns can be added on to package.

Looking for a **DIY MONTHLY PLUG-AND-PLAY CONTENT KIT**? Check out our

INDIGO ADVISOR CLUB →