



# Marketing Toolkit

*A Financial Planner's Tools for Success*



The [FPA Marketing Toolkit](#) has returned in a brand new electronic format with easier to use resources and updated content.

The new [FPA Marketing Toolkit](#) gives you the best practices, guides, models and ready-to-use templates for:

- Tactical marketing campaigns
- Public relations efforts
- Measuring implementation and effectiveness
- And much more

**BONUS:** The Toolkit also includes one consumer-focused PowerPoint presentation addressing the need and value of financial planning — a \$150 value!

*Buy it today and use it tomorrow!*

**ORDER NOW**

FPA Members: \$99 | Nonmembers: \$149

## Public Relations Templates and Guides

- How to Guide on Exhibiting, Media Relations and Speaking
- Elevator Speech
- Introduction Letter to the Media
- Letter Offering Your Organization as Speakers
- Member Speaking Engagement Release
- Letter Thanking Contact for Speaking Opportunity
- Annual Conference Attendee Press Release
- Retreat Attendee Release
- New Member Release
- CFP® Certification Announcement Release
- Financial Planning Week Member Event Release
- Planner Search Member Release
- Company Merger Release
- Member Relocated Release

## Marketing Plan

- Business and Marketing Plan Template
- Marketing Tactical Plan Sample and Template
- Budget Template

## Marketing Implementation

- AD Placement Tips
- Selling Tips
- Lead Generation and Conversion Tips
- Marketing Implementation Samples Introduction

### Samples of:

- Business Card Sample
- Letterhead Sample
- Flyer Sample
- Newsletter Sample
- Front Webpage Sample
- Quarter Page Ad Sample
- Brochure Order Form
- Financial Planning Perspectives Articles and Archives
- Financial Planning Perspective Order Form

## Practice Tools

- "Forging Your Financial Future" Power Point Presentation
- PowerPoint Presentation Order Form
- Brochure Samples
- Financial Planning Perspective Reprint Order Form
- Financial Planning Perspective Bundle
- Virtual Learning Center
- Virtual Learning Center—Archive Catalog

## FPA Resources

- FPA This Week Sample
- PlannerSearch
- Discount Publishers and Books Marketplace
- FPA Pro Bono Services
- Membership Application



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