FRANCIS FINANCIAL
Plan | Grow | Protect®

I Got the CDFA Certification: What Now?

Stacy Francis, CFP®, CDFA™, CES™
President and CEO
Francis Financial, Inc

Agenda

PART 1 – Preparing for Success

- ✓ What are the different types of marketing?
- ✓ What is a marketing plan and why use it?
- ✓ What sets your business apart?
- ✓ How do you determine your ideal client?
- ✓ How do you determine your key message?
- ✓ What are your goals?

Agenda

PART 2 – Taking action

- ✓ What marketing tools are available to you?
- ✓ How do you develop a marketing plan?
- ✓ What marketing strategies are right for you?
- ✓ How can your marketing plan be more effective?

PREPARING FOR SUCCESS

WHAT ARE THE DIFFERENT TYPES OF MARKETING?

Types of Marketing

PUSH MARKETING

PULL MARKETING

Push Marketing

Pull Marketing

WHAT IS A MARKETING PLAN AND WHY USE IT?

What is a Marketing Plan?

Why Use a Marketing Plan?

- ✓ Creates a blueprint for annual activities.
- ✓ Establishes priorities allowing you to spend money and time effectively.
- ✓ Provides a flexible and working document.
- ✓ Details tactics you will use and how often.

How to Develop a Marketing Plan?

Exercises on page 5 of workbook

WHAT SETS YOUR BUSINESS APART?

What Sets Your Business Apart?

**Exercise on pg. 6*

What Sets Your Business Apart?

- ✓ What sets your business apart?
- ✓ How are you different than other advisors out there?
- ✓ Why are you the best at solving your clients problems?

Exercises on page 7 of workbook

HOW DO YOU DETERMINE YOUR IDEAL CLIENT?

How Do You Determine Your Ideal Client?

What Do Your Favorite Clients Have in Common?

Exercises on page 8 of workbook

HOW DO YOU DETERMINE YOUR KEY MESSAGE?

How Do You Determine Your Key Message?

Think like your audience – get inside their heads – so you can focus on the key points they want and need to know!

Exercises on page 15 of workbook

WHAT ARE YOUR GOALS?

Understand Your Goals

Exercises on page 18 of workbook

TAKING ACTION

WHAT MAKERTING TOOLS ARE AVAILABLE TO YOU?

Marketing Strategies

PRESS

Press


CBS THIS MORNING SATURDAY
THE PRICE OF MARRIAGE
COUNTING THE HIDDEN COSTS OF WEDDING SEASON
ANSWERS TO YOUR FINANCIAL QUESTIONS
Email us for advice: CNNHelpDesk@CNN.com
new retirement
FRANCIS: PLAN AHEAD, STAY ON CONSERVATIVE SIDE & YOU CAN ACCUMULATE A GREAT NEST EGG
DOW +31.94 +0.25% 12,981.81
First in Business Worldwide.
U.S.News & WORLD REPORT
usnews.com
CBS
InvestmentNews
The Leading News Source for Financial Advisers
CNBC
CNN
the O'Reilly FACTOR
LEVO LEAGUE
savvy auntie
CNNMoney
Journal of Financial Planning
Women Money & Success
DAILY NEWS
NYDAILYNEWS.COM
WALL STREET JOURNAL
FA
FINANCIAL ADVISOR
REUTERS

WHY PRESS?

Credibility

Recognition

Prospecting

Free Marketing

Press Release

Press Releases Distribution

Free
I-Newswire.com
pr-inside.com

Paid
Prnewswire.com
Prweb.com
Businesswire.com

Exercises on page 24 of workbook

Press Pitch

Pitch! Press

Perfect the Press Pitch

Short & Sweet

Perfect the Press Pitch

Bio & Contact Infomation

Perfect the Press Pitch

Write Well

Spell Check

Perfect the Press Pitch

Interject Humor

Perfect the Press Pitch

Exude Confidence

Perfect the Press Pitch

Tell a Story

Give it an Angle

Develop Story Angle to Get Reporters' Attention

Local twist on national trend -
Recession hits home - 1 in 4 local businesses will fail

Pick a number/study -
Top 10 reasons your investment portfolio will fail in 2017.
Top 5 undiscovered tax tips that will save your readers money.

Personal story or success story -
Divorced woman cleans up credit after ex destroyed her score during divorce.

Roundup -
The best budgeting software for 2017 and why your readers need to know.

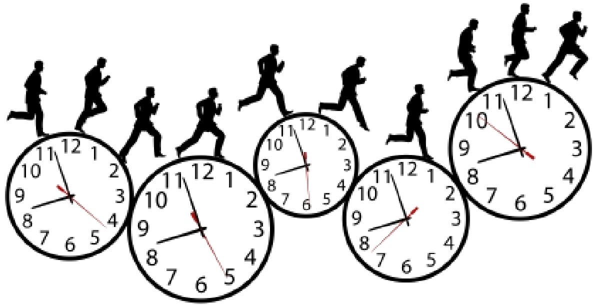
Where to Send Your Pitches

Use lead generating services to increase your PR opportunities

- ✓ prleads.com
- ✓ helpareporter.com (haro)
- ✓ sourcebottle
- ✓ pitchrate

Exercises on page 29 of workbook

Speaking to Reporters



Creating Solid Relationships With Reporters

Keep Track of Reporters, Friends & Colleagues in the News

Track Your Success

SOURCE:	TITLE:	LINK:	DATE:	CONTACT:	Type of Media
Investment News	Lessons from the $1B divorce case: How to split business assets	http://www.investmentnews.com/article/2015011	1/13/2015	Mercado, Darla	Divorce Financial Planning
CNBC	7.2 million Americans hiding money from spouses	http://www.cnbc.com/id/102353257	1/21/2015	Barrett, Jennifer	Financial Planning/Divorce
Talk 1073 Good Morning Baton Rouge - Radio Show	Hiding money from spouces		1/23/2015	Profita, Bill	Financial Planning/Divorce
CNBC	Bypass 'divorce month' by getting honest about money	http://www.cnbc.com/id/102355824	1/28/2015	Francis, Stacy	Financial Planning/Divorce
Omaha.com	Spats about money can quickly erode a relationship	pats-about-money-can-quickly-erode-a-	2/1/2015	Klingensmith, Dawn	Financial Planning
WSJ Blog	Why Financial Education Must Start at Home—but Often Doesn't	http://blogs.wsj.com/experts/2015/02/04/why-fin	2/4/2015	Lourpsa, Cristina	Financial Planning
Metro	Best money tips for millennials	http://www.metro.us/lifestyle/best-money-tips-for-	2/5/2015	Hayes, Marianne	Financial Planning
WSJ Blog	Why Millennials Need to Start Saving for Retirement Now	http://blogs.wsj.com/experts/2015/03/03/why-mi	3/3/2015	Lourpsa, Cristina	Financial Planning
SAYRA	STACY FRANCIS IS AN INSPIRATIONAL ROLE MODEL FOR FEMALE ADVISORS EVERYWHERE	MAGAZINE	3/3/2015	LeBlanc, Sydney	Financial Planning
WSJ Blog	Solving a Communication Breakdown	http://www.wsj.com/articles/solving-a-communicati	3/6/2015	Austin Kilham	Financial Planning
CNBC	These 20-somethings invest like 'Depression babies'	http://www.cnbc.com/id/102476674	3/10/2015	Sarah O'Brien	Financial Planning
vimeo	Short Take: Do This Now- Crucial Steps To Take If You Are Considering Divorce	https://vimeo.com/96214753	3/18/2015	Elise Pettus	Divorce Financial Planning
WSJ Blog	How Investors Can Create a 'Fun Fund'	http://blogs.wsj.com/experts/2015/04/08/how-in	4/8/2015	Francis, Stacy	Investing
WSJ Blog	Why Investors Shouldn't Worry About a Rising Dollar	http://blogs.wsj.com/experts/2015/04/09/why-inv	4/9/2015	Francis, Stacy	Investing/Financial planning
AARP	"Retirement Tips for Singles"	http://www.aarp.org/money/investing/info-2015/r	4/16/2015	Lynnette Khalfani-Cox	Retirement
CNBC	"Robo wars: How advisors are taking on cybercompetitors"	http://www.cnbc.com/id/102614564	4/27/2015	Sarah O'Brien	Financial Planning/ technology
CNBC	Time for retirees and near-retirees to cash in stocks?	http://www.cnbc.com/id/102632707?utm_source=	4/30/2015	Sharon Epperson	Retirement
Forbes	You're Retirement Age With Nothing Saved For Retirement. Now What?	http://www.forbes.com/sites/kateashford/2015/04	4/30/2015	Kate Ashford	Retirement
Finiancial Advisor IQ	A Firm Boosts Business by Getting More High-Touch	http://financialadvisoriq.com/c/1110993/118013/	5/1/2015		Business practices- client contact
Podcast - Divorce View Talk S	Recently single- reinventing your bank account	http://divorcesupport.podomatic.com/	5/15/2015	Joanie Wineberg	Podcast, financial planning
CNBC	"Investors: Are you protected from cyberattacks?"	http://www.cnbc.com/id/102676093	5/20/2015	Shelly Schwarts	Financial Planning/cyber protection
Daily Worth	What Are the Financial Pros and Cons of Marriage?	https://www.dailyworth.com/posts/3583-the-finan	5/27/2015	Farnoosh Torabi	Financial Planning
CNBC	Fine Wine & Finance VIDEO	http://video.cnbc.com/gallery/?video=3000383940	5/29/2015	Sharon Epperson	Financial Planning
CNBC	Exchange-traded funds now tops with advisors: Study	http://www.cnbc.com/2015/06/05/exchange-trade	6/5/2015	Sarah O'Brien	
CNBC	Say 'I do' to love & money: 3 smart money moves for newlyweds	http://www.cnbc.com/id/102737093	6/6/2015	Sharon Epperson	Financial Planning
Forbes	11 Financial Words All Parents Should Teach Their Kids	http://www.forbes.com/sites/jenniferwoods/2015/	6/8/2015	Jennifer Ryan Woods	Financial Education for Kids

Marketing Your Success

FRANCIS FINANCIAL
Plan | Grow | Protect

Dear Stacy,

We hope all is well and that your summer is off to a good start!

We are thrilled to announce that
Stacy Francis, CFP®, CDFA™ will be a featured guest on
CBS This Morning

CBS THIS MORNING

Tomorrow, Saturday, June 8th, 2013.
Stacy will be on air at approximately 8:20AM EST
on CBS.

Stacy will be interviewed by **Anthony Mason** and **Vinita Nair** regarding the cost of weddings today and its impact on Financial Planning for couples.

We hope you enjoy the show!

Don't forget to visit our ***Francis Financial Website*** for the latest news. You can also stay connected by following us on ***Facebook***, ***Twitter*** *and* ***LinkedIn****!*

As always, thank you for your continuous support.

Warmest Wishes,

The Francis Financial Team

PLAN | GROW | PROTECT®

Dear Stacy,

We are thrilled to announce that Stacy Francis will be appearing **live** on **CNBC TODAY at 2:20PM**.

Tune in to watch her live or visit *http://www.cnbc.com/live-tv/* shortly after the show where the clip will be added.

CNBC

Stacy will be joined by Tim Maurer, Director of Personal Finance, BAM Alliance. Anchors Mandy Drury and Brian Sullivan will be speaking to Stacy Francis about her take on PIMCO and if clients are showing concerns and asking questions.

As you may know, Stacy was recently chosen as one of 20 of the nation's leading wealth managers and financial experts to join the CNBC Digital Financial Advisor Council. You can read more about the council HERE.

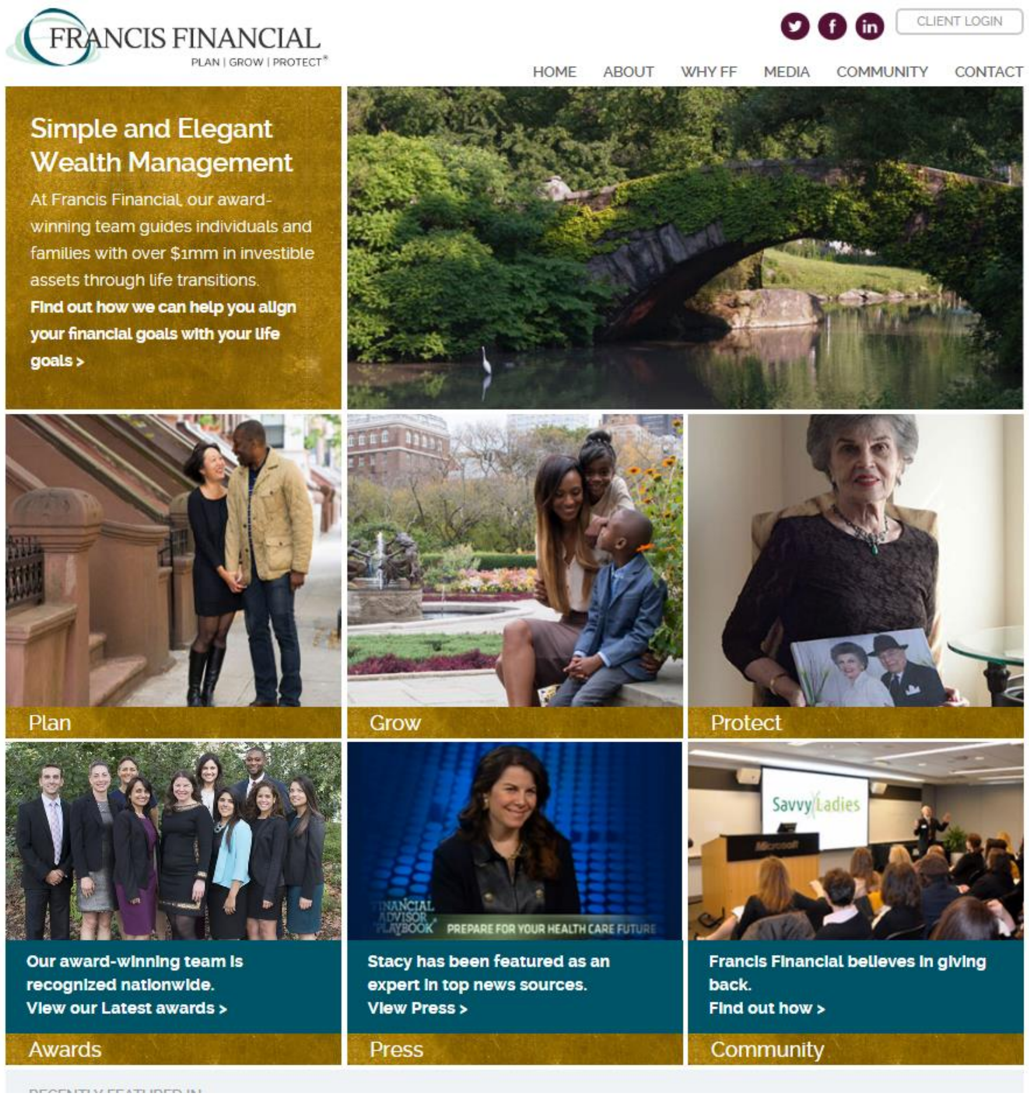
We hope you will be able to tune in! As always, thank you for your support. Please know that our team is a resource for you.

Warmest wishes,

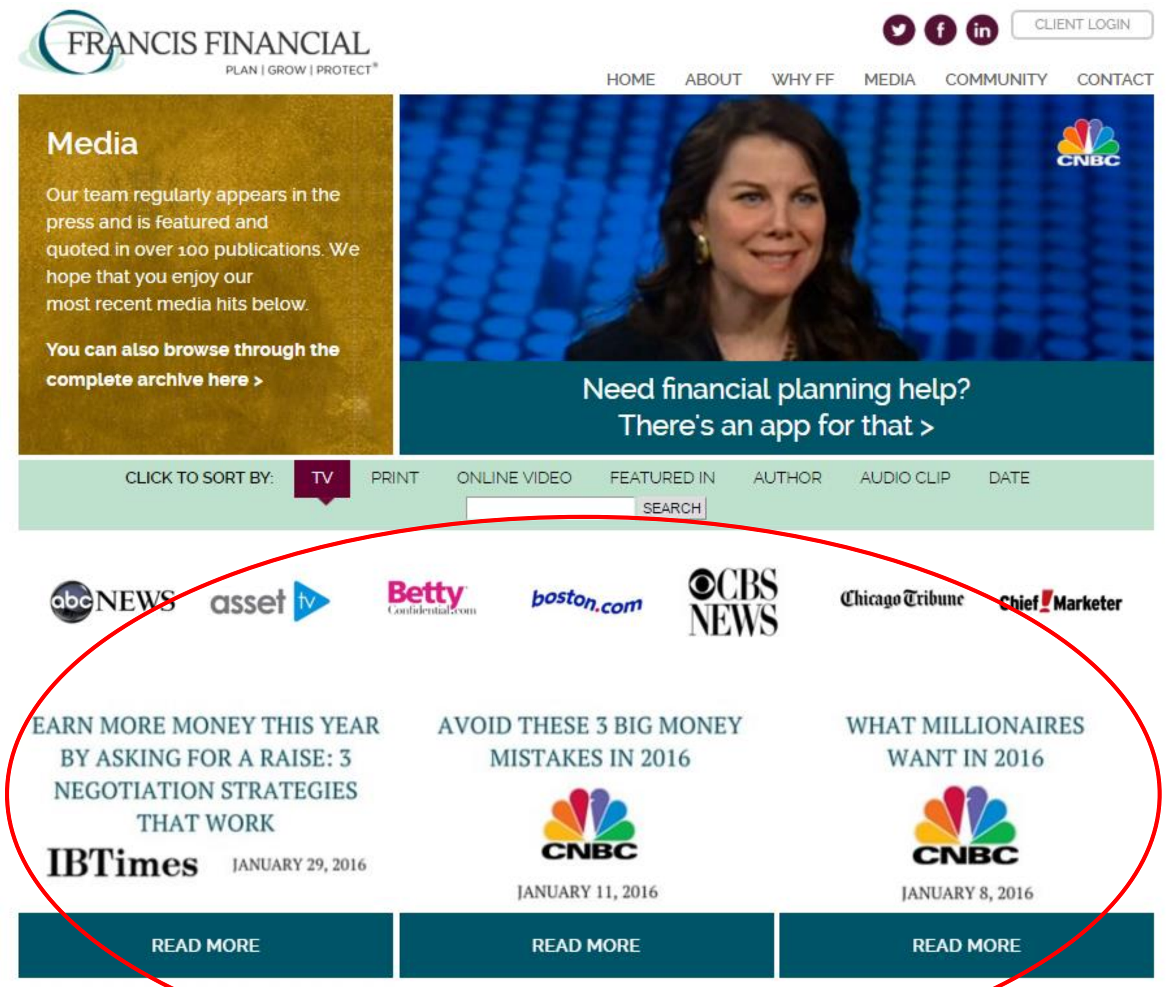
The Francis Financial Team

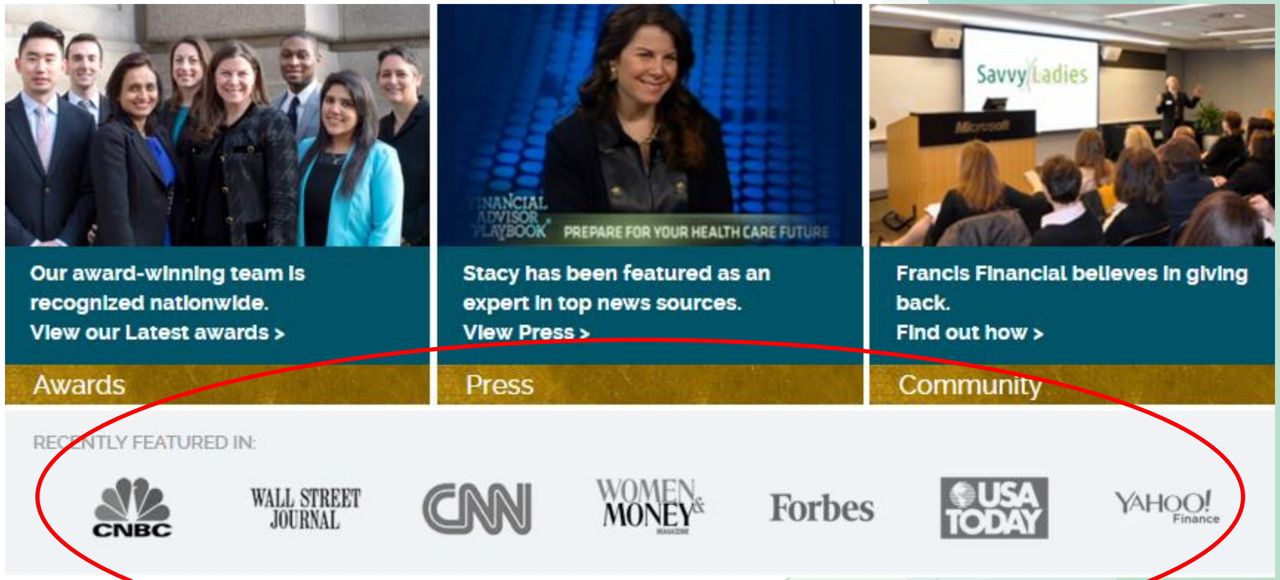
ONLINE MARKETING

Online Marketing



Online Marketing





CREATING RELEVANT CONTENT

Blog

Become an Expert Contributor

Stacy Francis is president and CEO of Francis Financial, an independent, fee-only wealth management practice dedicated to investment advisory services for women, couples and those experiencing divorce.

Become an Expert Contributor

THE WALL STREET JOURNAL.

THE EXPERTS

The Experts are a group of industry and academic thought leaders who weigh in on topics covered in the The Journal Report.

Stacy Francis

President & CEO, Francis Financial

Articles

The Financial Pitfalls of a Legal Marital Separation

November 8, 2016 07:03 am ET

WSJ Wealth Expert Stacy Francis looks at the ways couples who legally separate remain financially intertwined and exposed.

A Surprising Finding About Divorced Women and Money

December 16, 2015 06:15 am ET

I am in the process of conducting a survey of women who have gone through or are going through divorce, and I've just been in awe of the findings.

How Divorced Women Often Get Hurt When Dividing Retirement Assets

December 9, 2015 08:00 am ET

When it comes to retirement planning for female clients going through a divorce, one area in which women have to be especially careful is dividing retirement assets.

Forbes | Finance Council

Stacy Francis, President and CEO of Francis Financial

A nationally recognized financial expert, Stacy Francis's family influenced Francis Financial, which helps people find and maintain financial stability during transitions in their lives. "Early in my childhood, I witnessed how devastating life could be for women who were not empowered through financial education. My grandmother stayed in an abusive marriage because she did not have the skills to effectively deal with money," she wrote about founding her company. "That experience changed my life and drove me into the finance field."

Find out if you qualify to be a Forbes Finance Council member. Not a finance professional? Find out if you qualify for another executive community in the Forbes Councils network.

Forbes Councils are invitation-only communities for world-class business professionals.

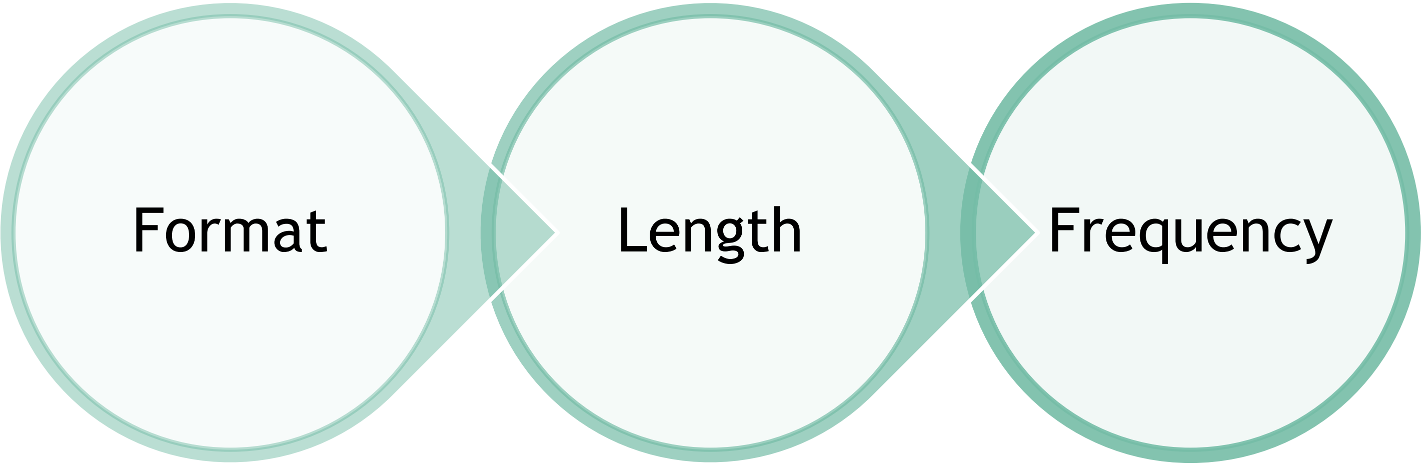
Podcast

Podcast


Theme
Post Production
Podcast
Format
Recording
Equipment

Podcast Theme

Podcast Format



Podcast Equipment & Software

Audio-Technica AT2020
Samson Meteor
Shure SM-58
Blue Yeti/Yeti Pro
Blue Snowball

Podcast Equipment & Software

Audacity

skype™

Podcast Post Production

Podfly

Divorce Source Radio with Steve Peck

WordPress

Podcast

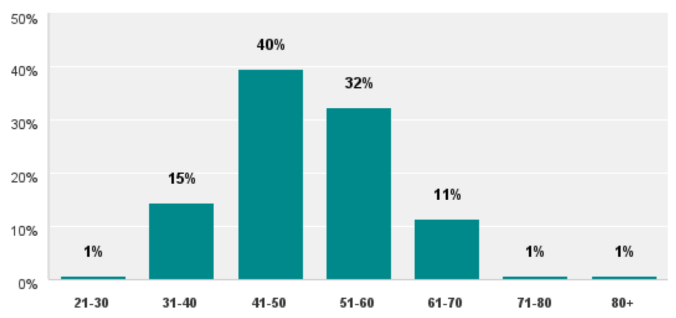
BECOME A THOUGHT LEADER THROUGH RESEARCH

Research Paper/White Paper

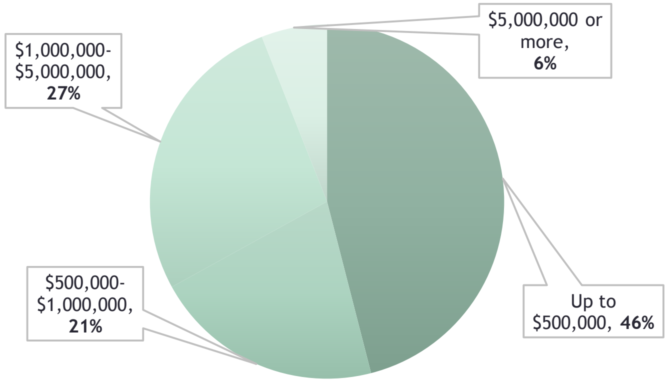
Unveiling The Unspoken Truth: Women, Divorce & Money

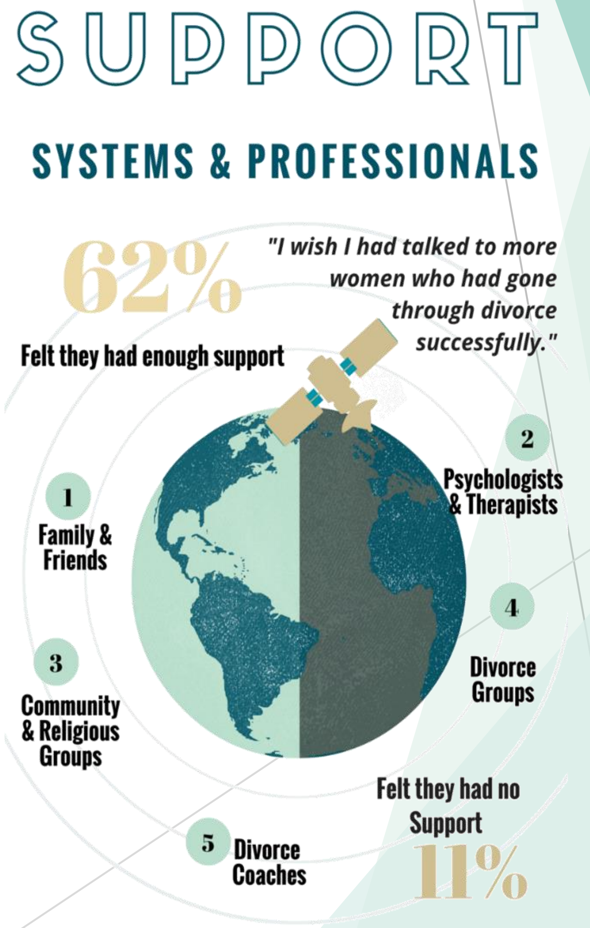
The Financial Challenges Women Face During and After Divorce

Age of Participants



Net Worth





Develop Your Survey

Conduct Your Research

Incentivize People to Participate

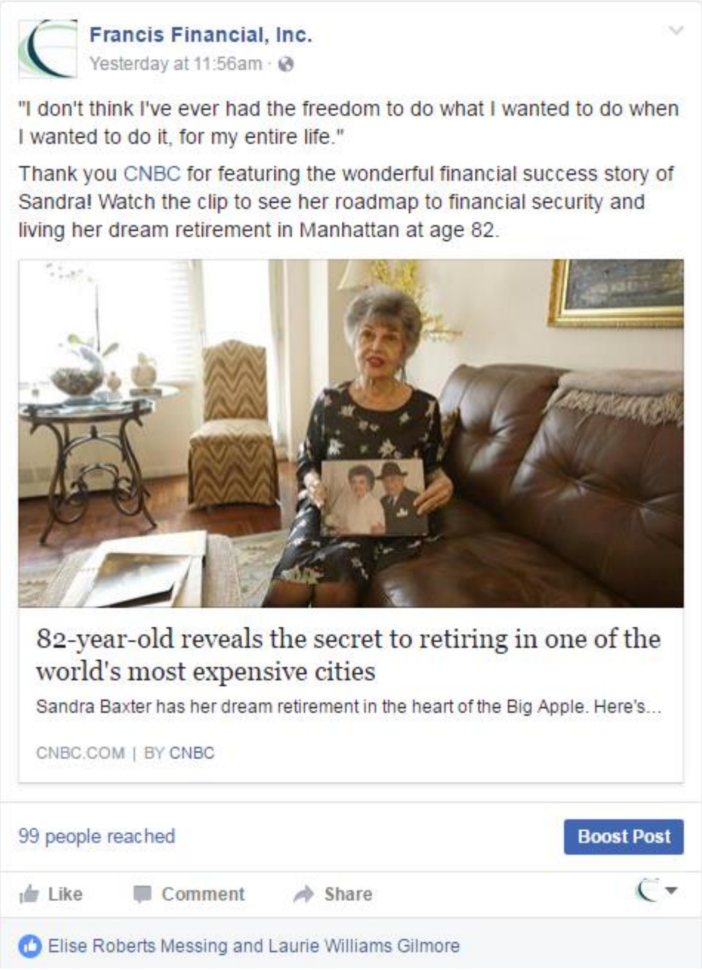
Reach Survey Participants

SOCIAL MEDIA

Use Social Media

Facebook

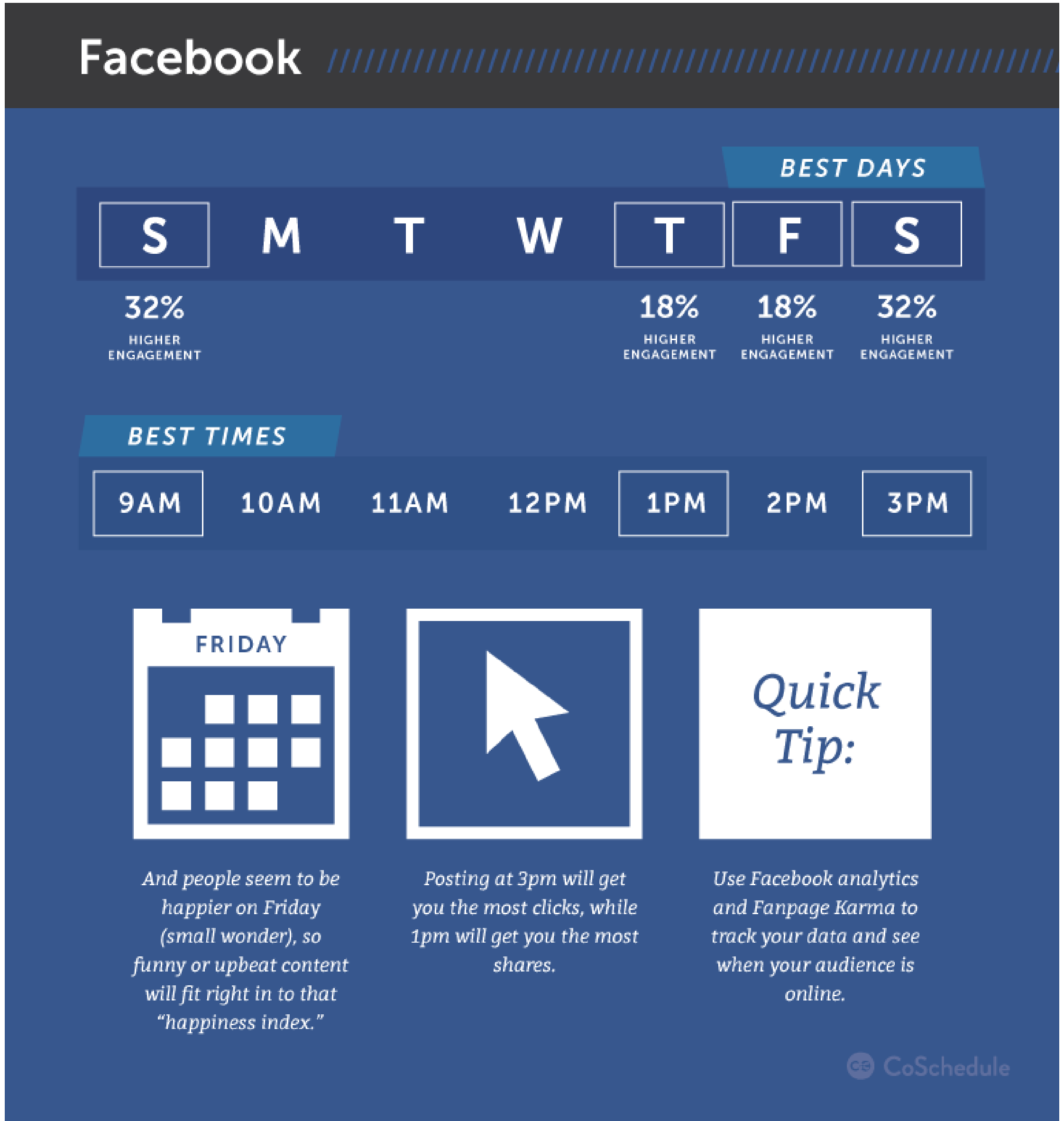
Francis Financial, Inc.
[redacted]
Home
Francis Financial, Inc.
@FrancisFinancialInc
Home
About
Photos
Follow us!
Likes
FF News!
Posts
YouTube
Create a Page
Like
Follow
Share
Contact Us
Message
Photos
Financial Planner in New York, New York
Open Now
Invite friends to like this Page
Francis Financial, Inc. is an independent, fee-only Wealth Management, Financial Planning and Divorce Financial Planning firm specializing in higher net worth individuals and families.
420 Likes
Gabrielle Humleker and 7 other friends like this
About
See All
(212) 374-9008
Send Message
www.francisfinancial.com
Financial Planner
Hours 9:00AM - 6:00PM
Open Now
Stacy Francis
I will be bold and forge women's advancement



Francis Financial, Inc.
Yesterday at 11:56am
"I don't think I've ever had the freedom to do what I wanted to do when I wanted to do it, for my entire life."
Thank you CNBC for featuring the wonderful financial success story of Sandra! Watch the clip to see her roadmap to financial security and living her dream retirement in Manhattan at age 82.
82-year-old reveals the secret to retiring in one of the world's most expensive cities
Sandra Baxter has her dream retirement in the heart of the Big Apple. Here's...
CNBC.COM | BY CNBC
99 people reached
Boost Post
Like
Comment
Share
Elise Roberts Messing and Laurie Williams Gilmore

Francis Financial, Inc.
April 17 at 5:47pm
"Too many women jump in the back seat when it comes to their finances."
Refinery29 tells the story of why Stacy Francis founded Savvy Ladies and pursued a career in finance.
The Depressing Reason Women Should Care About Money
Stacy Francis felt intimidated by math and money — until she realized just...
REFINERY29.COM
764 people reached
Boost Post
Like
Comment
Share
Savvy Ladies, Shawna Caves Dye and 14 others
Top Comments
Write a comment...

When Should You Post on Facebook?



BEST TIME

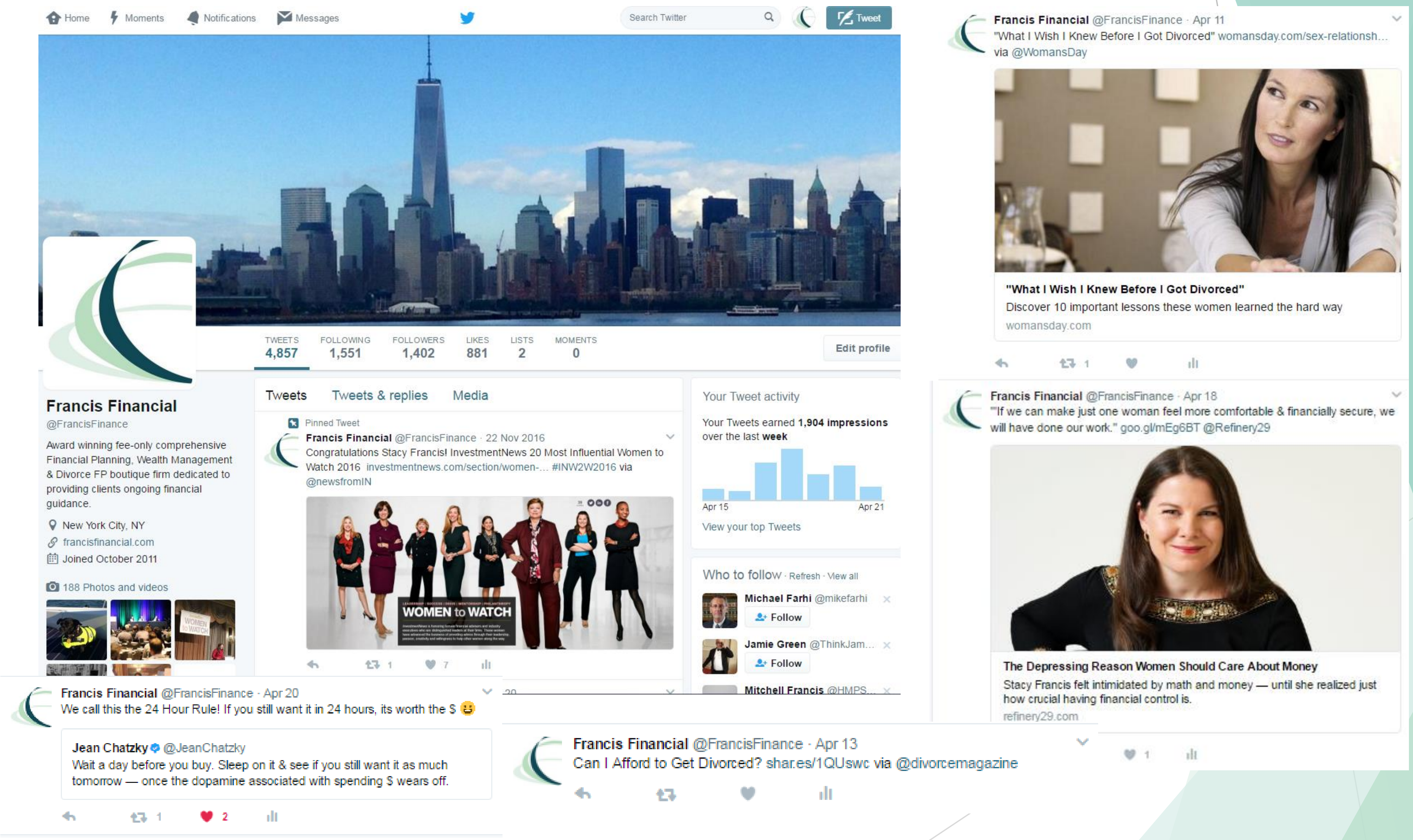
Thursday - Sunday

9am

1pm

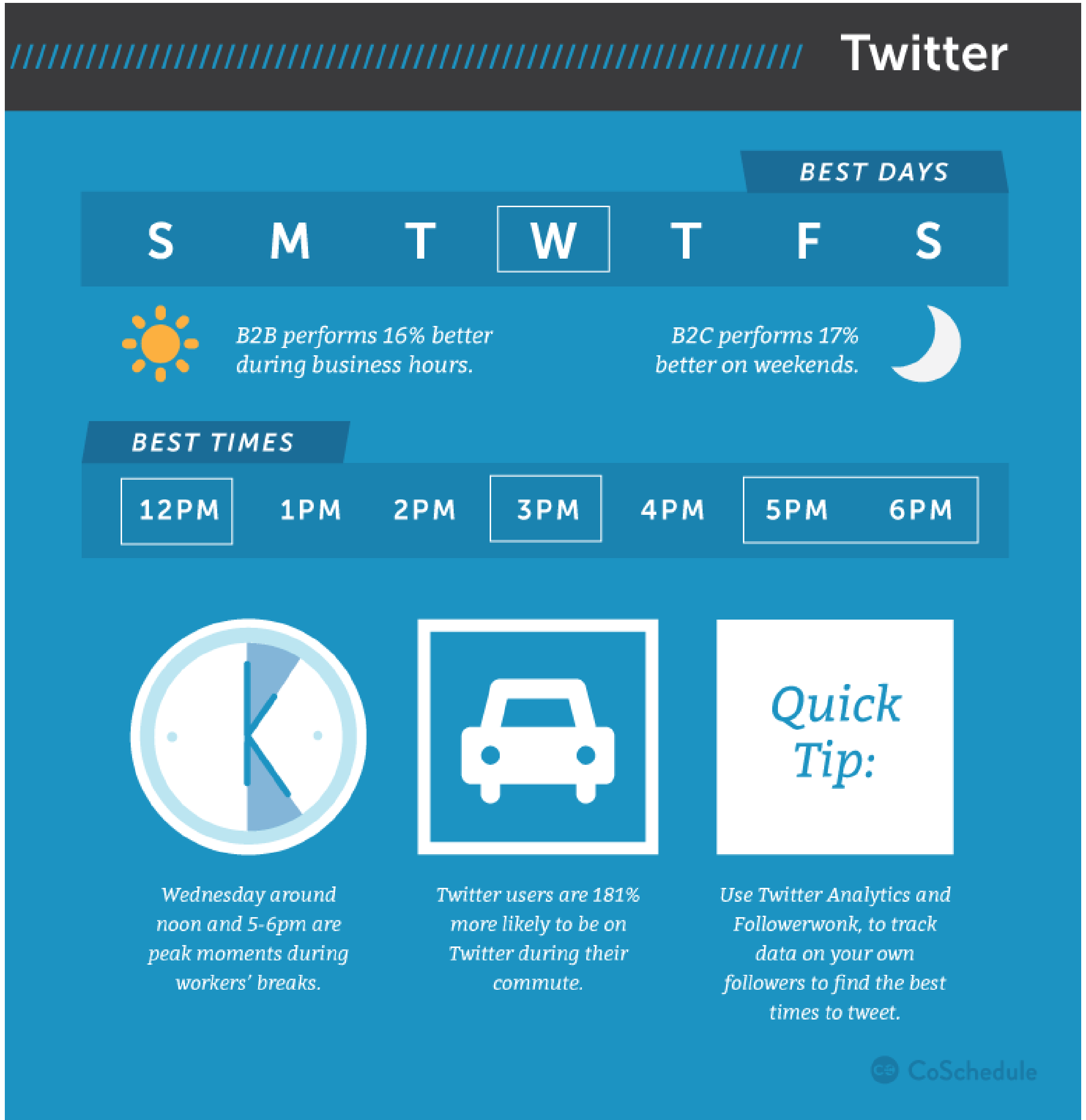
3pm

Twitter



Home
Moments
Notifications
Messages
Search Twitter
Tweet
TWEETS 4,857
FOLLOWING 1,551
FOLLOWERS 1,402
LIKES 881
LISTS 2
MOMENTS 0
Edit profile
Francis Financial
@FrancisFinance
Award winning fee-only comprehensive Financial Planning, Wealth Management & Divorce FP boutique firm dedicated to providing clients ongoing financial guidance.
New York City, NY
francisfinancial.com
Joined October 2011
188 Photos and videos
Tweets
Tweets & replies
Media
Pinned Tweet
Francis Financial @FrancisFinance · 22 Nov 2016
Congratulations Stacy Francis! InvestmentNews 20 Most Influential Women to Watch 2016 investmentnews.com/section/women-... #INW2W2016 via @newsfromIN
WOMEN to WATCH
Your Tweet activity
Your Tweets earned 1,904 impressions over the last week
Apr 15
Apr 21
View your top Tweets
Who to follow · Refresh · View all
Michael Farhi @mikefarhi
Follow
Jamie Green @ThinkJam...
Follow
Mitchell Francis @HMPS...
Francis Financial @FrancisFinance · Apr 20
We call this the 24 Hour Rule! If you still want it in 24 hours, its worth the $
Jean Chatzky @JeanChatzky
Wait a day before you buy. Sleep on it & see if you still want it as much tomorrow — once the dopamine associated with spending $ wears off.
Francis Financial @FrancisFinance · Apr 11
"What I Wish I Knew Before I Got Divorced" womansday.com/sex-relationsh... via @WomansDay
"What I Wish I Knew Before I Got Divorced"
Discover 10 important lessons these women learned the hard way
womansday.com
Francis Financial @FrancisFinance · Apr 18
"If we can make just one woman feel more comfortable & financially secure, we will have done our work." goo.gl/mEg6BT @Refinery29
The Depressing Reason Women Should Care About Money
Stacy Francis felt intimidated by math and money — until she realized just how crucial having financial control is.
refinery29.com
Francis Financial @FrancisFinance · Apr 13
Can I Afford to Get Divorced? shar.es/1QUswc via @divorcemagazine

When Should You Post on Twitter?



BEST TIME

Wednesday

12pm

3pm

5pm

6pm

LinkedIn

Francis Financial, Inc.
Financial Services
1-10 employees

Home

Francis Financial, Inc. is an award winnding Boutique Wealth Management and Financial Planning firm dedicated to providing successful individuals and families personalized financial guidance. Our fee-only approach promises objectivity in our recommendations and services to you, and provides fiduciary loyalty and financial peace of mind to our family of clients. Our firm specializes in servicing clients with approximately $2-3 Million and more in investible assets.

We also specialize in Divorce Financial Planning, where we analyze and forecast the short-term and long-term impacts of any given settlement, and offer unbiased recommendations to our clients. We work closely with Divorce Attorneys, mediators, coaches and other divorce professionals through this process.

Specialties
Fee-Only Financial Planning, Fee-Only Wealth Management, Fee-Only Divorce Financial Planning

Website http://www.francisfinancial.com	**Industry** Financial Services	**Type** Public Company
Headquarters 39 Broadway Suite 1730 New York, NEW YORK 10006 United States	**Company Size** 1-10 employees	**Founded** 2002

Linked in

Recent Updates

Francis Financial, Inc. "I don't think I've ever had the freedom to do what I wanted to do when I wanted to do it, for my entire life." Thank you CNBC for featuring the wonderful financial success story of Sandra! Watch the clip to see her roadmap to financial security and living her dream retirement in Manhattan at age 82.

82-year-old reveals the secret to retiring in one of the world's most expensive cities
cnbc.com · Sandra Baxter has her dream retirement in the heart of the Big Apple. Here's how she did it.

Like · Comment · Share · 1 day ago

Francis Financial, Inc. "Too many women jump in the back seat when it comes to their finances." Refinery29 tells the story of why Stacy Francis founded Savvy Ladies and pursued a career in finance.

The Depressing Reason Women Should Care About Money
goo.gl · Stacy Francis felt intimidated by math and money — until she realized just how crucial having financial control is.

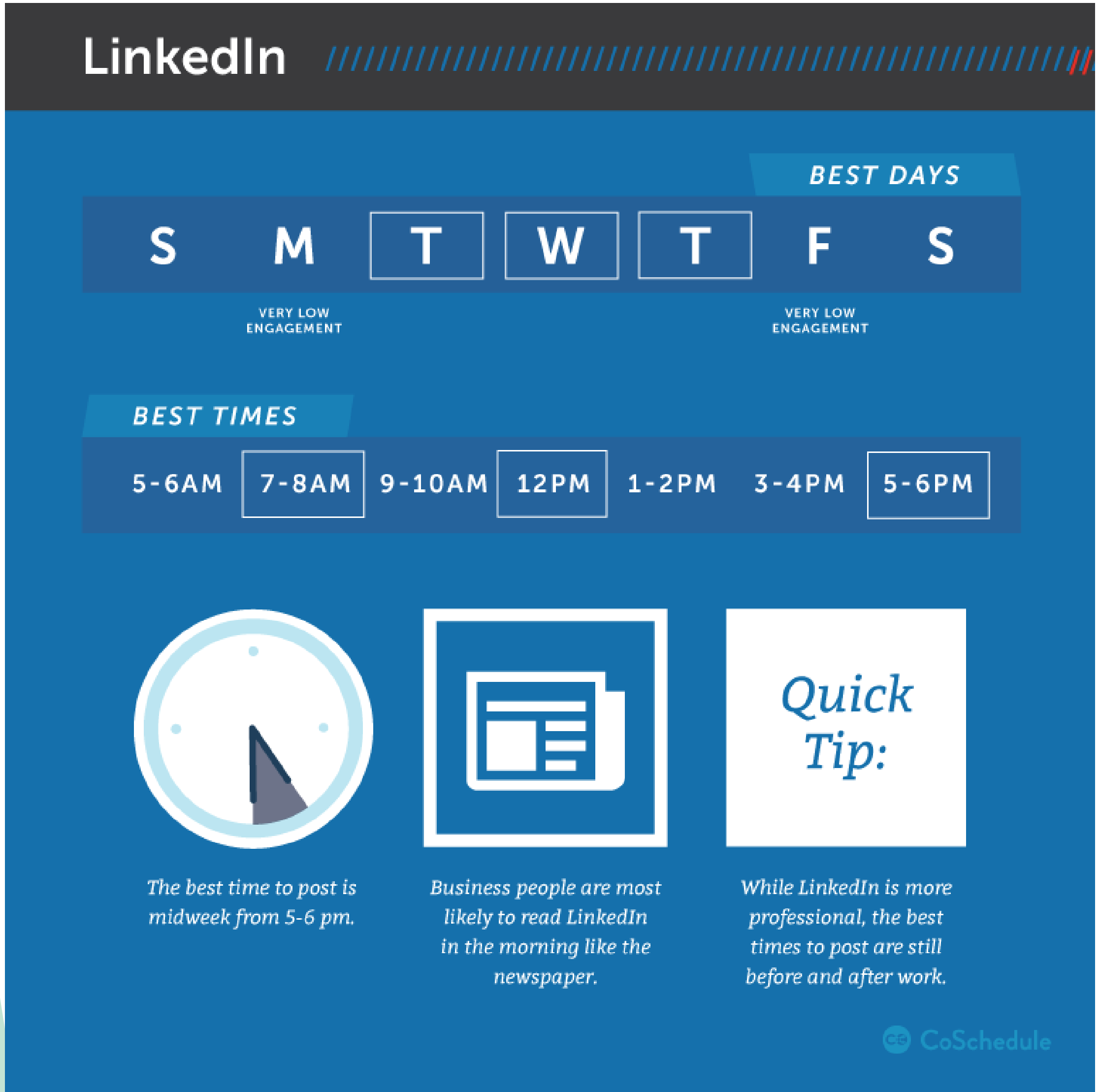
Like · Comment · Share · 3 days ago

Francis Financial, Inc. Stacy Francis says, "the first financial step is getting educated about your entire financial picture, understanding how much your current lifestyle costs, but also understanding your assets – investment accounts, retirement accounts and liabilities." via The Wall Street Journal

Financial Steps Women Need to Take After Divorce
wsj.com · Stacy Francis, president and CEO of Francis Financial, talks the first financial steps women need to take after a divorce, and how to plan out exactly what to ask for in the future.

Like · Comment · Share · 7 days ago

When Should You Post on LinkedIn?



BEST TIME

Tuesday - Thursday

7am 12pm

8am 5pm

6pm

Social Media Plan

Hootsuite™

Manage your entire social media campaign

Social Media Plan

30%

15%

25%

30%

Exercises on page 33 of workbook

AWARDS

Awards

How Do I Get An Award?

Awards

2016 InvestmentNews WOMEN to WATCH

smartCEO

SmartCEO's EXECUTIVE MANAGEMENT AWARDS
HONORING YOUR LEADERSHIP TEAM MEMBERS

2015 WOMEN'S CHOICE AWARD®
FINANCIAL ADVISOR

FINANCIAL PLANNING 2013 PRO BONO AWARDS
FOUNDATION FOR FINANCIAL PLANNING

SmartCEO's Brava awards
Honoring top female CEOs

Invest in Others
Charitable Foundation

enterprising Women
THE MAGAZINE FOR WOMEN BUSINESS OWNERS
2015 AWARD FINALIST

Medical Economics®
SMARTER BUSINESS. BETTER PATIENT CARE.

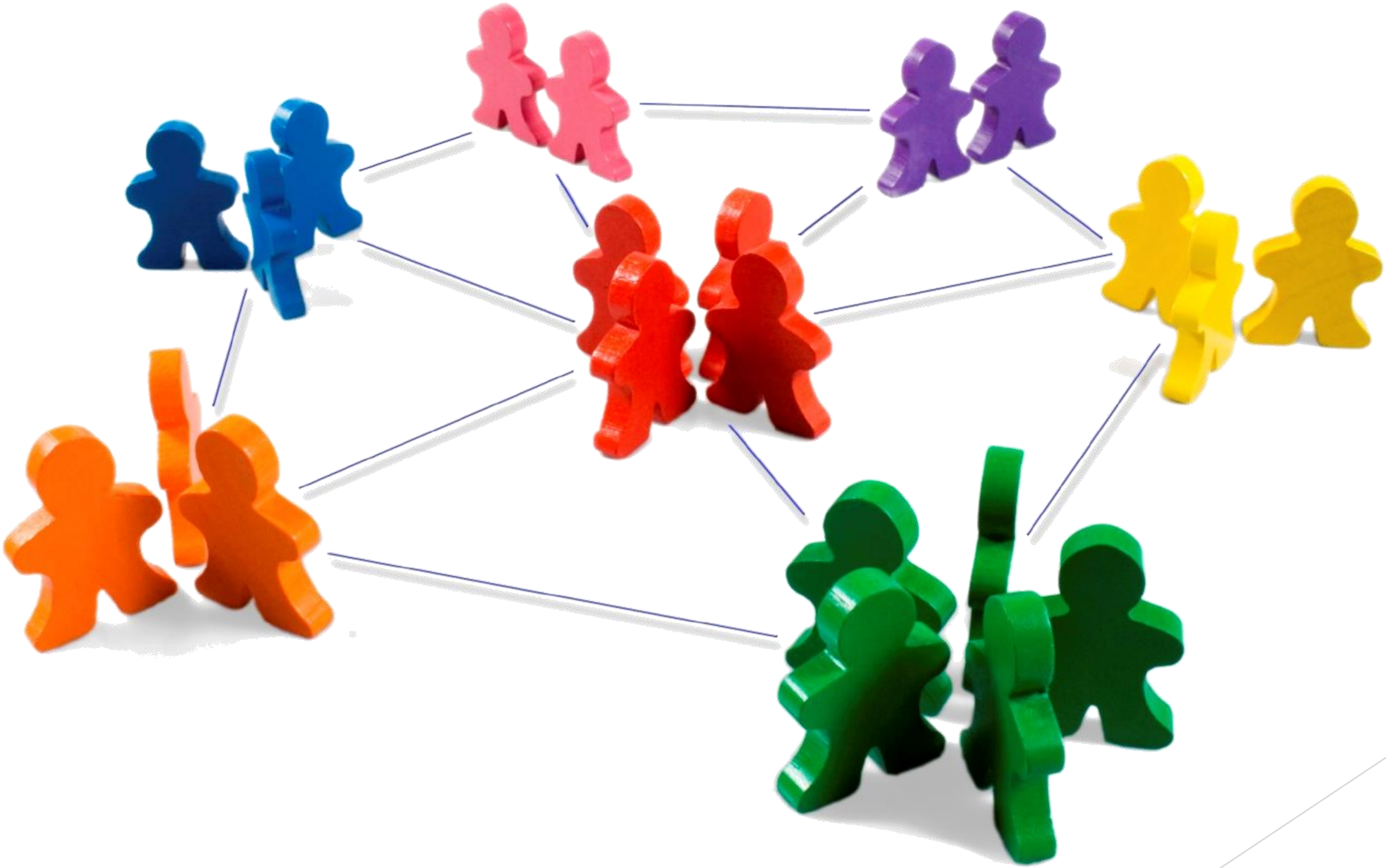
Display Your Awards

Exercises on page 34 of workbook

NETWORKING

Networking

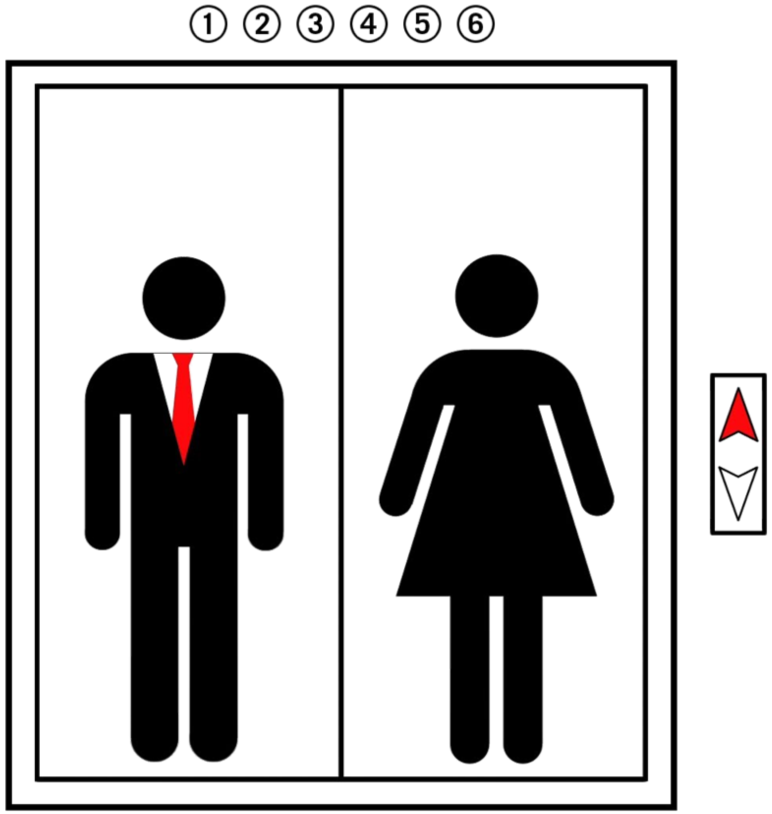
Centers of Influence



Make the Most of Your Networking

Exercises on page 34 of workbook

Elevate Your Pitch



Exercises on page 37 of workbook

SPEAKING ENGAGEMENTS

Speaking Engagements

Speaking Engagements

Speaking Engagements

- ✓ What do you have to say?
- ✓ What is your expertise?
- ✓ What are trends you have noticed among your clients?
- ✓ What valuable information can you share with the audience?
- ✓ Have you done a research paper you want to share?
- ✓ Have you conducted interviews?
- ✓ Do you have a book or e-book?

Booking Speaking Engagements

How to Book Speaking Engagements

Much like pitching to the press, booking speaking engagements is about having the perfect pitch.

- ✓ Make sure to keep your pitch concise.
- ✓ Give a detailed outline, but you don’t have to give everything away from the start.
- ✓ Give your presentation personality- use humor, give it an angle.
- ✓ Give your presentation a good title

How to Book Speaking Engagements

DID YOU KNOW THAT?

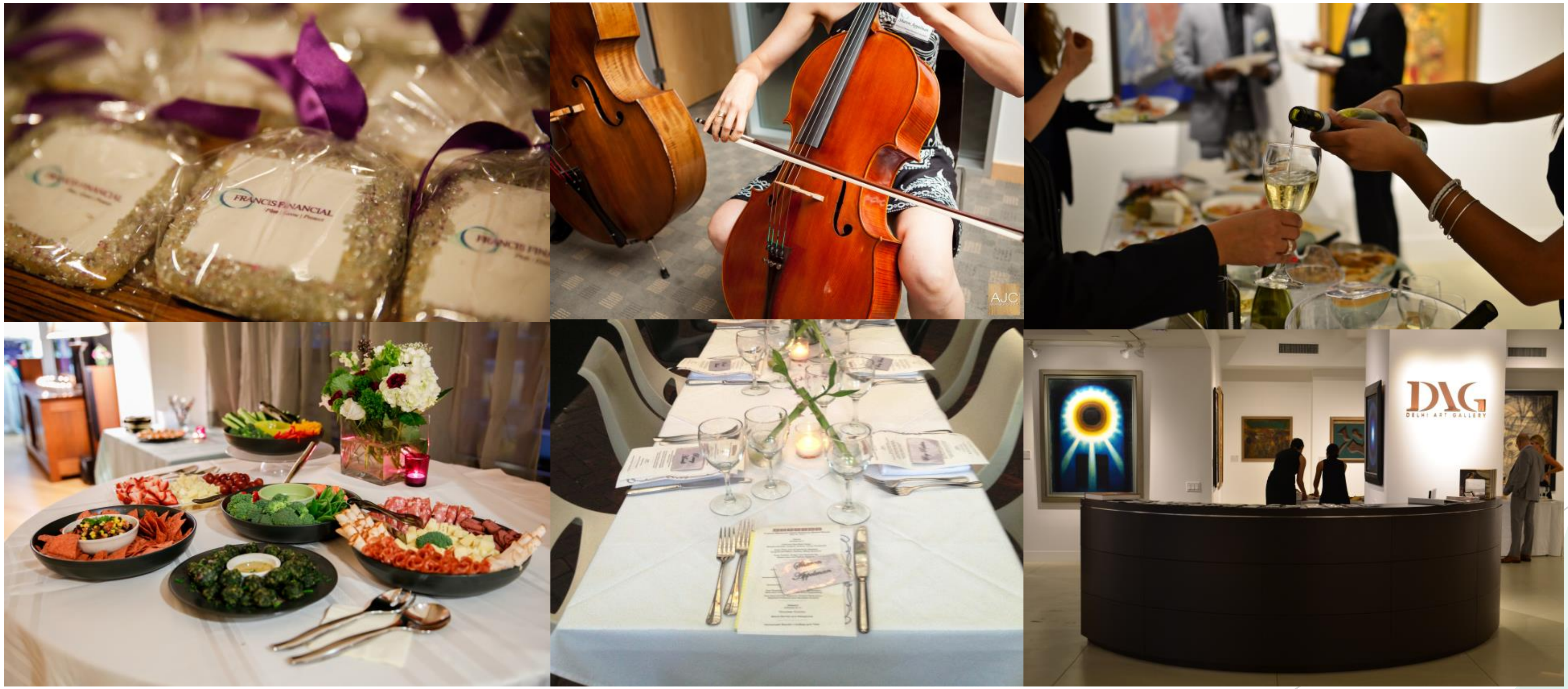
- ✓ Tell your story (we'll talk more about your personal story later on)
- ✓ ALWAYS include your bio. Make sure this bio highlights your most recent media hits, awards, recognitions.

Exercises on page 38 of workbook

EVENTS

Events

Event are a great way to bring referral partners, clients and potential clients together.



Networking Events for Referral Partners

Networking Events for Referral Partners

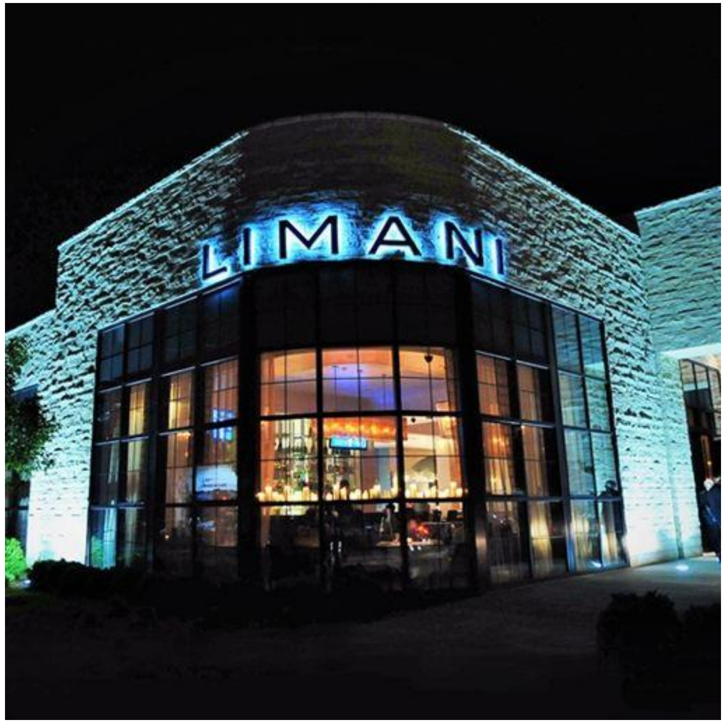
Host small, medium and large events.

Limani Lunches

Small event

Forensic Accountant

Divorce Coach



Accountant

Mediator

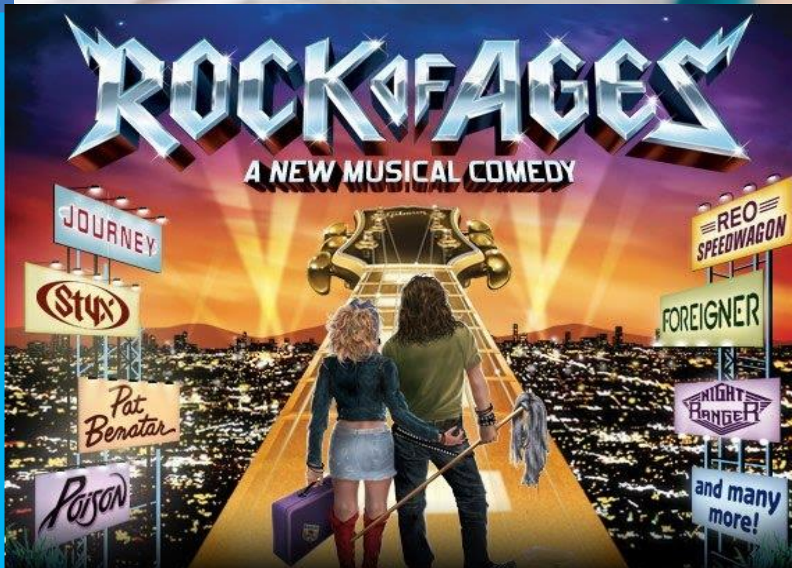
Therapist

Trust and Estate

Litigator

Outside the Box Events

Medium Events



Outside the Box Events

Medium Events

Rum Tasting at My Home

Thank You Events

Large Events

Art Galleries, Rooftop Bars, Francis Financial Office

Networking Events for Clients

Appreciation Events for Clients





Appreciation Events for Clients

Wine Tasting Soiree at My Home

Appreciation Events for Clients

Influencers' Dinner

Appreciation Events for Clients

Summer Boat Events

Networking Events for Potential Clients and Clients

Divorce Research Thank You Event

5 Teas for Your Divorce Journey

The "Parting Ways" Tea
Rosemary Rooibos Herbal Tea

This caffeine-free herbal tea will be one less thing keeping you up at night. The notes of this tea - sometimes nutty, savory, and (bitter)sweet - will taste similar to what you are likely to experience along this journey. This rooibos, rosemary, verbena, licorice root tea will leave you filled with hope for a new tomorrow.

The "Independent Woman" Tea
Aged Cooked Pu'er Tea

This pu'er is tippy, making a robust, smooth and earthy brew with a gentle sweetness, which is probably how you are feeling. You are now on your own and you want to stay healthy, strong and confident. Pu'ers are also found to aid weight loss and lower cholesterol. Revenge body, here we come!

The Morning of the Pre-Trial Tea
Tangerine White Tea

As much as you want to down a couple of bottles of wine today, go with this citrusy and soothing cup of white tea. Its hint of sweetness will lift your spirits and calm your nerves. With an orange peel and tangerine flavor, it will be a delightful and relaxing choice.

"I Found the Missing Assets" Tea
Darjeeling 2nd Flush Black Tea

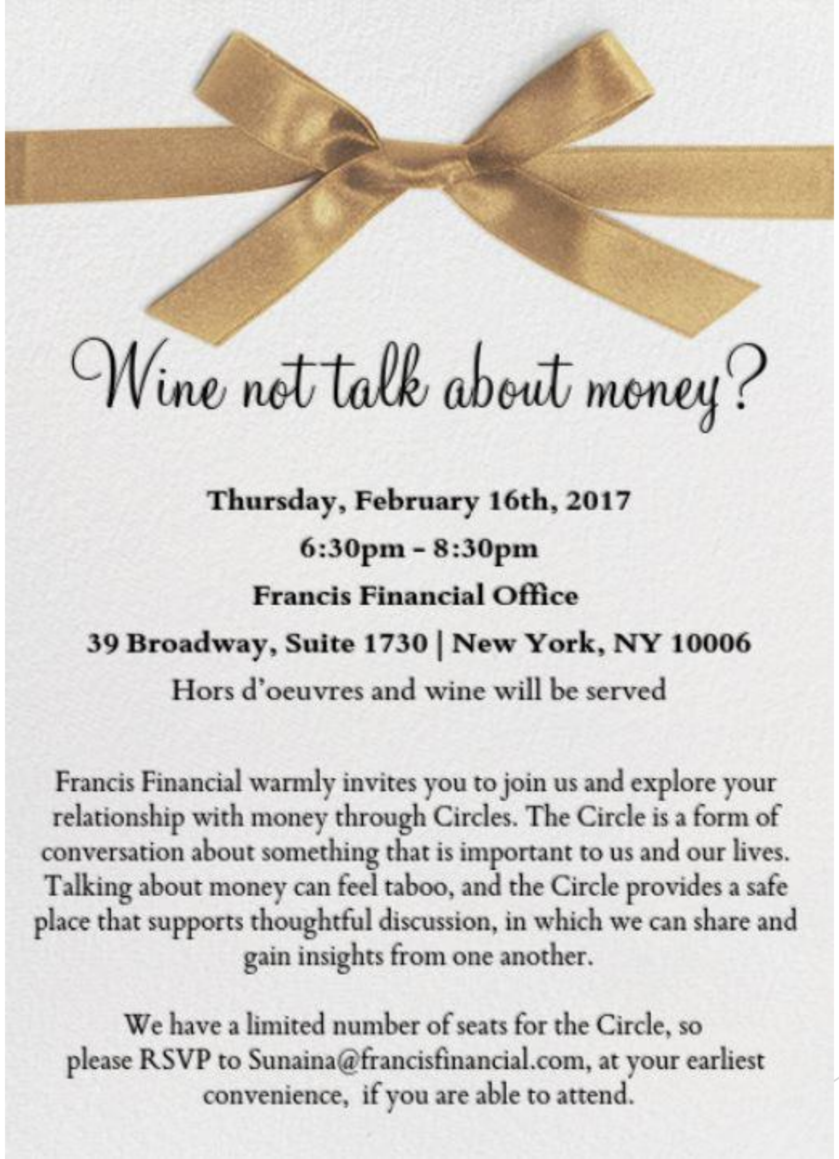
Celebrate you"needle in a hay stack" discovery. Referred to as the "champagne of teas" this rare black tea can only be found at the foot of the Himalyays and is known for its natural fruitiness, muscatel flavor, and slight astringency. It is full of joy, defiance, fearlessness and success.

The "Celebration Party" Tea
Osmanthus Oolong Tea

Save the best for last. This sweet, festive and fragrant tea will be a hit at your celebration party. The aroma of the osmanthus flower, combined with the nuttiness of oolong, makes for a classic combination. This is the beginning of your next chapter - now go show the world what you're made of!

Educational Events for Potential Clients and Current Clients

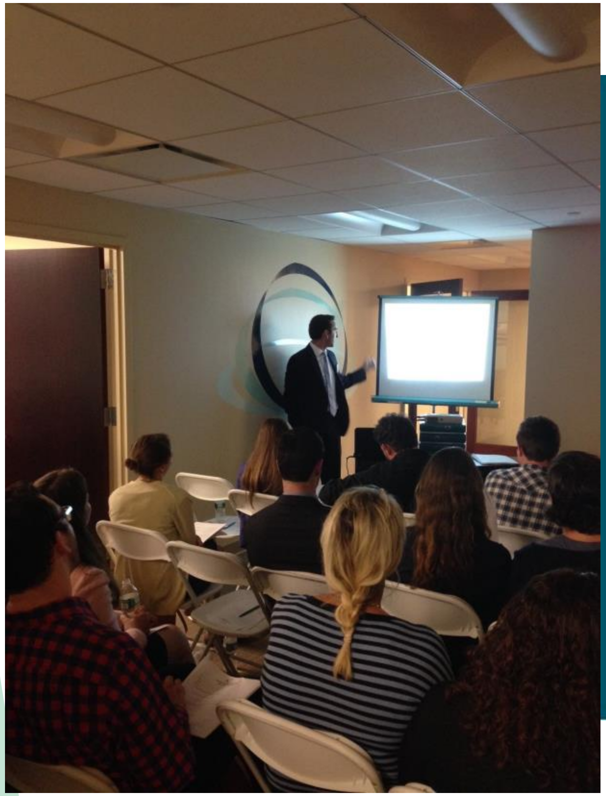
Money Conversation Circles for Potential Clients and Current Clients



Money Conversation Circles for Potential Clients and Current Clients

- Money Circle Trainings
- Elizabeth Jetton
- www.turningpoint.vision/circletraining-retreat

Finance 101 for Kids



SNAIL MAIL

Money Tree for All New Clients

Welcome Gift

Special Events Gift

New baby

Special Events Gift

Macaroons for Valentine’s Day to Widows and Divorced Clients

Special Events Gift

Cookies for Divorce Month
Matrimonial Attorneys, Therapists, Forensic Accountants, Divorce Coaches

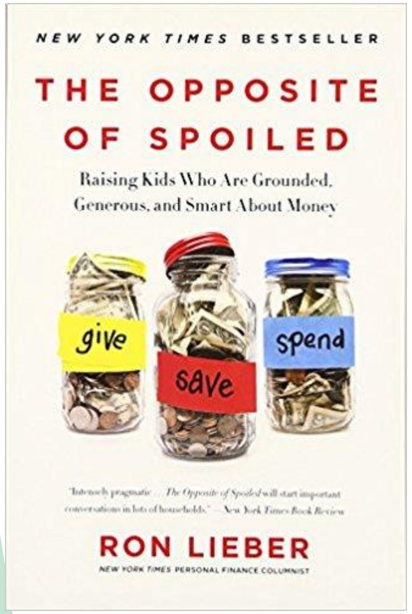
Special Events Gift

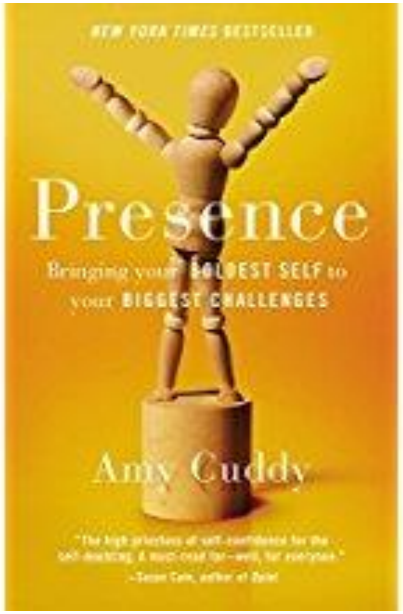
Chocolates for Tax Season

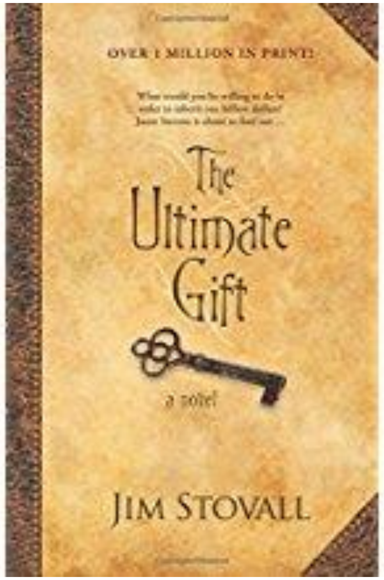
CPA’s

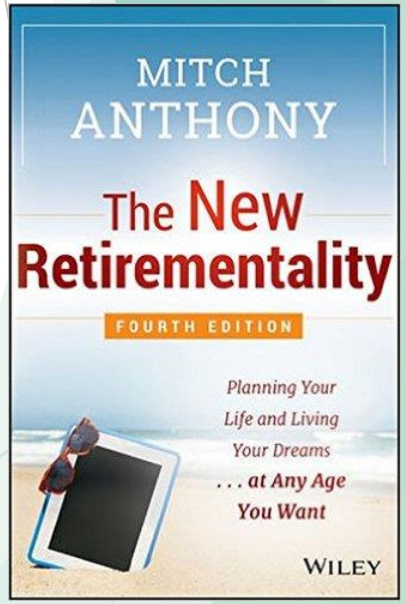
Helpful Gifts

Books









Holiday Mailings

Holiday Mailings

Handmade Cookies for Thanksgiving

Handwritten Notes

HOW CAN YOUR MARKETING PLAN BE MORE EFFECTIVE?

Marketing Your Success

Extreme Customer Service

Friendly Polite

Helpful Efficient Professional

Resolution **Knowledgeable** Honest

Understanding Reliable

Listen Attentive

Be Timely

Be Attentive

Are you listening?

Be Inviting & Supportive

Personal Story

Exercises on page 39 of workbook

Your Marketing Plan

Exercises on page 43 of workbook

Questions?

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follow us on twitter

@FrancisFinance

Stay in Touch!

For more questions regarding our marketing efforts, please feel free to email Sunaina Mehra, Marketing Manager at Francis Financial.

Sunaina@francisfinancial.com