MARKETING MADE EASY
NEWSLETTER JUNE 2024

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MAXIMIZING YOUR MARKETING
IN THE SUMMER MONTHS

As we all know, summer can be a challenging time for marketing, as many people turn their attention away from financial matters and toward vacations. Yet with a little focus and creativity, summer can also be a great time for advisors to reinvigorate their marketing strategies. The season's unique opportunities can help you deepen relationships with existing clients and attract new prospects, including:

Leveraging Summertime for Client Appreciation Events

Warm weather and long days provide the perfect backdrop for hosting outdoor client appreciation events. Consider organizing casual gatherings like barbecues, picnics, or golf outings. Likewise, summer holidays like Independence Day and Labor Day offer perfect, targeted opportunities to connect with clients and prospects in a more relaxed setting. Events like these can strengthen client loyalty, showing them that you value their business while providing an amazing and strategic way to generate referrals.

Seasonal Themed Content

Tailor your marketing content to reflect summer themes. Use blog posts, newsletters, or radio episodes that address summer-related financial topics such as vacation budgeting, managing finances during travel, or planning for year-end expenses. This seasonal relevance can capture attention and provide valuable insights that resonate with your audience.

Social Media Engagement

Summer is a great time to ramp up your activity on Facebook and other social media formats. Share photos and stories from your events, post educational content, and engage with your audience through polls and Q&A sessions. Highlighting your firm's community involvement and personal touches can make your brand more relatable and engaging.

Summer Promotions

Introduce special promotions to attract new clients. Offer a complimentary financial review or a discount on your services for new clients who sign up during the summer. Limited-time offers can create a sense of urgency and motivate potential clients to act.

Collaborating with Local Businesses

Partnering with local businesses can help you reach a broader audience. Co-host seminars or workshops with local real estate agents, mortgage brokers, or tax professionals. These collaborations can provide mutual benefits and introduce your services to a new demographic. Use our marketing guide to get more ideas on business collaborations.

Personalized Client Communication

As noted, summer often means vacations and varied schedules, so maintaining regular, personalized communication is crucial. Send personalized emails or make phone calls to check in with your clients. This personal touch can go a long way in maintaining strong client relationships and demonstrating your ongoing commitment to their financial well-being.

Summary

By taking advantage of the unique opportunities that summer presents, you can enhance your marketing efforts and build stronger connections with both current and potential clients. Whether through personalized communication, engaging content, or community events, a well-rounded summer marketing strategy can yield significant and lasting benefits for your business.

TORO BRAVO INVESTMENT ADVISORS, LLC

MONTHLY MEGAHIT

Brian Moon, RSSA, CFF and Mubashir Subhani, RICP, CFF

Each month we like to feature advisors who are doing exceptional work. This month we are featuring Brian Moon and Mubashir Subhani at Toro Bravo Investment Advisors, LLC, in Amarillo, TX. Brian is a Registered Social Security Analyst (RSSA) and earned a Certificate in Financial Planning from Boston University.

Subhani holds a Bachelor of Arts in Economics and Political Science from the Honors College and College of Arts and Science at Texas Tech University, where he graduated Cum Laude. Together, their goal is to be qualified wealth managers, trusted advisors, and good stewards of their clients' funds by serving the investment community with honor and distinction.

Primary Coach Rick Bates had this to say:

"This dynamic duo is really hitting their stride! They have learned the Scranton Sales Process and put their own twists on it producing spectacular results. They credit their success to hard work and never giving up learning. The past few months have been a production breakout for them, and we wish them even more in the future!"

Well done, Brian and Subhani, and best wishes for your continuing success!