

Financial Advisor Marketing Plan

1 Business Goals

What are your top marketing goals for the next 12 months?

- ☐ Increase qualified leads
- ☐ Increase consultation requests
- ☐ Grow assets under management
- ☐ Expand into a new niche
- ☐ Improve client retention
- ☐ Other: _____

Success looks like:

2 Ideal Client

Who is your ideal client?

Primary audience: _____

Life stage: _____

Common financial challenges: _____

Questions they ask most often: _____

3 Positioning & Messaging

Complete this statement.

We help _____

solve _____

so they can _____.

What makes your firm different?

4 Website & SEO

Review your website.

- ☐ Is it clear who you serve?
- ☐ Is it clear what you offer?
- ☐ Is there a clear call to action?
- ☐ Are your service pages complete?
- ☐ Does your website answer common client questions?

5 Content & Thought Leadership

List five questions your clients ask most often.

1. _____
2. _____
3. _____
4. _____
5. _____

These become your next content topics.

6 Lead-Generation Channels

Which channels will be your primary focus this year?

- ☐ Referrals & Reviews
- ☐ LinkedIn
- ☐ Seminars & Webinars
- ☐ Paid Search
- ☐ Email Marketing
- ☐ Other: _____

Your top two priorities:

1. _____
2. _____

7 CRM & Follow-Up

How will you stay connected with prospects?

- ☐ Email nurture
- ☐ Follow-up reminders
- ☐ Scheduled check-ins
- ☐ CRM automation
- ☐ Other: _____

8 Measure Success

Track these KPIs quarterly.

- | | |
|--|--|
| ☐ Website Traffic | ☐ Conversion Rate |
| ☐ Qualified Leads | ☐ Cost per Lead |
| ☐ Consultation Requests | ☐ Return on Ad Spend (ROAS) |
| ☐ New Clients | |

Review Date: _____

Notes & Next Steps



Book a Strategy Call with Seapoint Digital