

## Review for Coaching

Take a few minutes to compile any of the following marketing elements that you may have and bring these with you to the coaching session. This information will provide the foundation for discussions regarding marketing your services and identifying how to most effectively retain clients, gather referrals, and increase your flow of highly desirable clients.

Description of your Information	Have Item	Don't Have
Your Firm Marketing Plan	<input type="checkbox"/>	<input type="checkbox"/>
Your client newsletter	<input type="checkbox"/>	<input type="checkbox"/>
Professional association brochures you use	<input type="checkbox"/>	<input type="checkbox"/>
Other mailing pieces you have sent	<input type="checkbox"/>	<input type="checkbox"/>
Announcements of your Client Events	<input type="checkbox"/>	<input type="checkbox"/>
Business card	<input type="checkbox"/>	<input type="checkbox"/>
Your firm marketing brochure	<input type="checkbox"/>	<input type="checkbox"/>
Your RIA disclosure brochure or ADV Part II	<input type="checkbox"/>	<input type="checkbox"/>
Your RIA Engagement Agreement	<input type="checkbox"/>	<input type="checkbox"/>
Your current Planning Fee Schedule	<input type="checkbox"/>	<input type="checkbox"/>
Stationery – letterhead and envelope	<input type="checkbox"/>	<input type="checkbox"/>
Advertisements you have used	<input type="checkbox"/>	<input type="checkbox"/>
Copies of Yellow Pages listings	<input type="checkbox"/>	<input type="checkbox"/>
Prior direct mail pieces you have used	<input type="checkbox"/>	<input type="checkbox"/>
Prior mass or broadcast e-mail messages	<input type="checkbox"/>	<input type="checkbox"/>
Description of your desired <b>A</b> Client	<input type="checkbox"/>	<input type="checkbox"/>
Description of your desired <b>B</b> Client	<input type="checkbox"/>	<input type="checkbox"/>
Description of your market area	<input type="checkbox"/>	<input type="checkbox"/>
Postal Reply Cards you have used	<input type="checkbox"/>	<input type="checkbox"/>
Post Cards you have used with clients	<input type="checkbox"/>	<input type="checkbox"/>
Post Cards you have used with prospects	<input type="checkbox"/>	<input type="checkbox"/>
Copy of your audio business card	<input type="checkbox"/>	<input type="checkbox"/>
Copy of your CD-ROM business card	<input type="checkbox"/>	<input type="checkbox"/>
Printed copy of opening screen of web page	<input type="checkbox"/>	<input type="checkbox"/>
Other marketing items	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

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