

NIFTY ADVISOR SUPPORT

DIGITAL MARKETING SERVICES



Let's show them the
power of a fiduciary.

OUR CREATIVE PROCESS

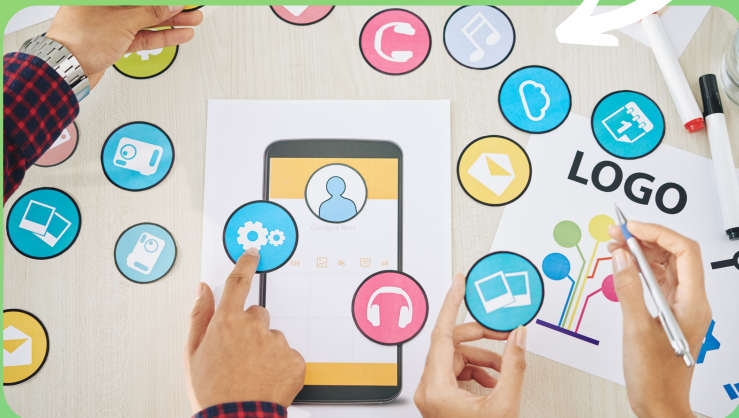


Share Your Story

At the core of everything we do, our creative process boils down to one element: Understanding your wants and needs. Our goal is to create content that is right for you!

Get Organized

Successful marketing campaigns revolve around being able to plan, create, and consistently execute them - which is why great, reliable marketing is imperative.



Let Us Create

Creativity inspires us to apply innovative solutions to mundane problems. With a team of talented designers, we create content that is both unique and prosperous for every client.

ONGOING STRATEGY

Only available for our Strategic Programs

Why do I need a strategy?

Similar to a financial plan, you cannot implement tasks with a client without a plan and expect to reap long-term results. Your time and money are valuable. Without understanding the "whys" and "hows", you will find yourself creating inefficiencies and misallocating your time without the direction and intention of a long-term marketing plan.

How does Nifty create my strategy?

- Review your Google Analytics to ensure each website visitor has a quality user experience
- Review your social media analytics to see what's working and what's not working
- Understand your target market through your personal story and everyday interactions
- Review your existing public image for brand consistency and awareness

DESIGN & COPYWRITING

Visually designed with your readers in mind

Ongoing design and copywriting expertise that visualizes the entirety of your client experience

How We Can Help

- Streamline your brand across mediums
- Thoughtful design and copy placement
- Designed around your user experience
- Quick edits or entire rebrands
- Emergency design and copywriting support
- Experience with Adobe and Canva

What We've Created

- Brochures
- Templates
- Letterhead
- Websites
- Business cards
- Social media cards
- Lead magnets
- Presentations
- Webinar marketing
- Event marketing
- Logos
- Email campaigns
- Website ads
- Social media ads



BLOG WRITING

Optimize your search engine ranking, increase website traffic, and engage readers

Publish financial planning or lifestyle content that serves your target audience and your long-term business goals

How We Can Help

- Industry research, covering your brand, market and competitors
- Content that aligns with your marketing strategy
- Professional copy editing
- Keyword and phrases research
- Optimized blog posts for SEO
- Manage blog calendar
- Imagery and visuals to include throughout each blog post for increased engagement



SOCIAL MEDIA MANAGEMENT

Agile, custom solutions for digital platforms

Our team will plan a monthly social media feed on your own white-labeled calendar tailored to accomplish your digital communication goals.

How We Can Help

- Dedicated social media manager
- Social media marketing strategy support
- Social account setup
- Brand consulting
- Editorial calendar
- Copywriting and content plan creation
- Track and analyze key metrics (allows us to adjust strategy as needed)
- Hashtag creation
- Google review monitoring
- Quarterly performance report

Social Platforms

- LinkedIn
- Facebook
- Twitter
- Instagram
- YouTube
- Google My Business
- TikTok
- Pinterest



EMAIL MARKETING

Engaging campaigns that promote action

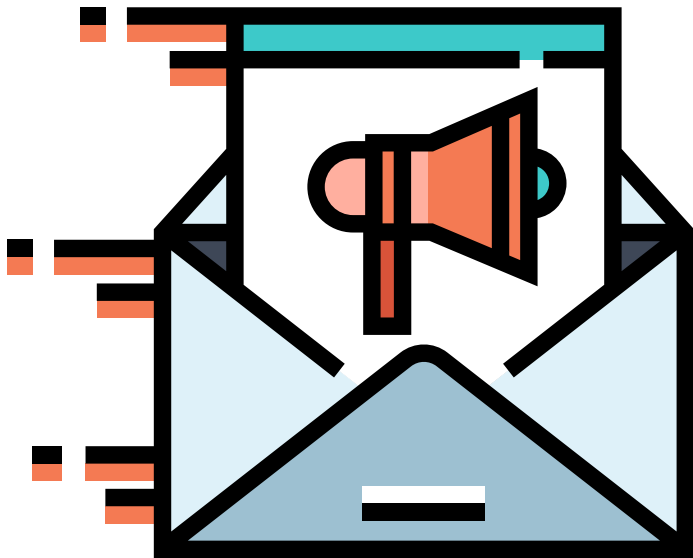
Increase your open and click-through rates with high-quality email templates and ongoing campaign management.

How We Can Help

- Writing/Editing Content
- Reporting and Analytics
- Custom Email Template
- Multiple Newsletter Designs
- Account Set Up
- Automations
- Subscriber tracking
- List clean up

Types of Campaigns

- Welcome subscribers
- Quarterly market newsletter
- Targeted emails
- Nurture or reengage leads
- Drip campaigns
- Storytelling
- Request meetings



PODCAST MANAGEMENT

Professionally edited, mixed, & ready to publish

Well-structured and polished episode complete with music, sound effects, and everything you need to sound your best

How We Can Help

- Intro/outro added
- Mixed and edited professional broadcast standard
- Background noise reduction
- Volume matching to industry standards
- Ums, ahs, and restarts trimmed and removed
- ID3 tagging
- Edits added at specific timestamps
- Music added at specific timestamps
- Sound effects added at specific timestamps
- Uploaded to your podcast hosting provider
- Cover art design
- Streamline show notes



STRATEGIC PROGRAMS

Carefully crafted quarterly programs designed by our marketing experts



Digital Marketing

Recommended for

Bronze

Advisors who need activity, but are not actively prospecting

Silver

Advisors who are actively prospecting and nurturing

Gold

Advisors who are actively prospecting

Benefits

- Ongoing SEO Optimization
- Monthly Web and Social Analytics
- Quarterly Written Observations
- Quarterly Strategy Meeting

X

X

X

X

X

X

X

X

X

N/A

X

X

Content Management

- Blogs (500-700 words)
- Social Media Management (up to 3 social media handles)
- Newsletter (max 700 words)
- Virtual Assistance for custom needs

1 blog/month

2 blogs/month

3 blogs/month

2 posts/week

3 posts/week

5 posts/week

1 newsletter/month

2 newsletters/month

3 newsletters/month

N/A

5 hours/month

10 hours/month



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