

**Tools of the Trade**  
*Must-Haves for Your Personal Marketing Campaign*  
by Peter Montoya

What are the essential tools of a good marketing campaign? In my view, every financial advisor can benefit from having a few basic marketing tools with a similar look and consistent messaging.

**Personal Logo**

Every marketing tool you create must include your logo. Your logo unites your name, icon and slogan and promotes your brand identity. Your icon is a visual talisman, a symbol that people can associate with your business. Your slogan sits next to your name and icon. Your slogan says in a few short words a) what you do and who you do it for, or b) what you do and the benefit.

Keep your logo clean and easy to reproduce. Make your name the most prominent feature. Use your name, not some faceless impersonal entity no one will remember.

**Personal Brochure**

One marketing tool should sum up what you do and who you do it for – the Personal Brochure, a full-color brochure that should fold up into a 6” x 6” to 8” x 8” square.

Your Personal Brochure presents you as “the answer.” It explains your value to your target audience, positioning you as the convenient, ideal provider of solutions to their financial needs. It differentiates you from the pack.

A good Personal Brochure is the perfect follow-up to a professional or client referral, and a great way to stand out and promote yourself as a specialist to the prospects you really want.

Personal Brochure tips:

- Hire a professional writer, designer and photographer help you to create your brochure. (This is true for all Personal Marketing materials.)
- Design the brochure in a non-standard size for greater visibility.
- Place your contact information, logo and slogan on the back panel.
- Print on 100 lb. cover stock with a quality printer, not just the one who gives you the best price.

**Personal Postcard & Personal Flyer**

The tools are slightly different, but the purpose is the same – to create a shell for your marketing messages that conveys not only your message but your brand identity. Both of them are designed to mirror the look and feel of your Personal Brochure.

A Personal Postcard is a full-color, 6” x 9” direct mail card. On one side is your brochure cover headline (and if applicable, subheadline), space for a label, and your return address and logo. The left or right third of the other side presents your photo next to about 40-60 words explaining what you do and who you do it for; the rest of the space is left blank so you can overprint new messages every time you send a mailing to your target audience, making the card a customizable direct mail weapon.

A Personal Flyer is a larger and less expensive version of the same product, with the only disadvantages being that it can’t be self-mailed and could be easily damaged. Like

the Postcard, the Flyer also includes your contact info – and some (very) brief copy, really no more than about 15-25 words, referencing your services and/or value.

Copy can be a marketing message, financial news, a holiday greeting or a notice about an upcoming event. Just write your new message, take blank cards to a printer, and in 24 hours you have a customized direct mailing.

Personal Postcard & Flyer tips:

- Allow plenty of blank white space for your messages.
- Make sure the design coordinates with your Personal Brochure.
- Print on quality stock – they need to stand up
- Print more than you think you'll need. You'll use them.

### **Sales Letters**

Good sales letters can attract some very high-quality responses for pennies on the dollar. The most important part of any sales letter is the headline. It must grab you. "How to maximize your retirement savings" is a bad headline. "When you're 75, will you be flipping burgers?" is a grabber. The rest of the copy must be as intriguing.

Sales letter tips:

- Use subheads to make the letter eye-friendly.
- Make it one page or less if at all possible.
- Get to the point about your services by the middle of page one.
- End with an offer or discount to invite responses.
- Use a "P.S." to make important information stand out.

### **Personal Websites**

Your website can be a powerful lead-gathering tool, and present the online surfer with additional content about you and your services that is not found in your brochure. Short copy on the home page and easily navigable links should lead to pages that present more detail about your services, your background and your company. Bells and whistles (article libraries, seminar schedules, retirement income and savings calculators, stock search engines, and special reports) also add value and help to keep the prospect intrigued enough to e-mail you and learn more.

Peter Montoya is President of Peter Montoya Inc. - the only advertising agency in the country that specializes in financial advisors. Check out [MarketingLibrary.net](http://MarketingLibrary.net) for unlimited access to hundreds of marketing articles, letters and invitations for only \$10 per month. Learn more at [www.MarketingLibrary.net](http://www.MarketingLibrary.net) or by calling (888) 730-5300.