

“I had a prospect hit me up to manage their IRA and Roth accounts at the pool this morning. I forgot they were on my mailing list and they have been getting my newsletters and received the IRA contribution page.”

**Thanks,
Victor**

Newsletter Basics

- **Frequency**
 - Quarterly is a minimum
 - Monthly is a maximum
- **Content**
 - Information readers can use. It's the best way to build trust with those who may eventually want to buy your solutions
 - Include your photo
- **Size**
 - Content dictates size
 - Don't start big and dwindle. The reverse is always better

Who should receive your newsletter?

- You don't know when a reader might be positioned to become a client or refer a client to you. Reach out. Let the reader decide they don't want your publication. Don't decide for them.
 - **Visitors to your web site**
 - Give them a reason to come back to your site
 - Family
 - Friends
 - Business associates
 - Neighbors
 - Anyone who inquires about your firm
 - Business cards from meetings
 - Attendee lists from conferences, anywhere you might speak

Developing copy for a newsletter

- **Every article should answer the question: What's In It For the Reader (WIIFR)?**
 - **Write your articles with a specific audience/person in mind who you consider an ideal client**
 - **Bring unique sources or ideas into the article**
 - **Use active voice. Talk about NOW not about what has happened**
 - **Create strong, intriguing headlines and subheads**

How to Find Article Ideas

- **Clip pieces you find of interest from your reading**
 - **Build a library of topics you can expand with additional research**
 - **Respect copyright laws**
- **Listen to what your clients want**
- **Look for controversy. When do you disagree with popular advice?**
- **Focus on your expertise**
- **Share personal information**
- **ASK FOR THE READER'S BUSINESS**

How Much Does a Newsletter Cost

- **Design**
 - Initial masthead, column layout
 - Production of the actual newsletter
- **Content**
 - Purchased or self-authored articles
- **Artwork /Photographs**
 - Purchase from online stock images
- **Printing**
 - 2 color vs 4 color
 - Quantities
- **Postage**
 - First class - 44 ¢
 - Standard pre-sort - 21.3¢ to 27.3¢

What Are Your Delivery Options?

- **Print – mailed to recipient**
 - Know the piece is received, shelf life
 - Control of look and feel
- **Email**
 - Pfd to control look and printability
 - Formatted email newsletter
 - If formatted email...options include
 - All content in the email
 - Continue on a web site
- **Website**
 - Email teaser with links to site

Services to Make the Job Easier

- **Template designs**
 - <http://office.microsoft.com/en-us/templates/>
 - <http://www.stocklayouts.com>
- **Subscription content**
- **Complete newsletters**
 - **Active Managers Resource Center – Thoughtful Investor newsletter**
- **Email / Mailing Services**
 - **Constant Contact and like services**
 - **Mail houses**

Newsletters Are Ideal if You...

- **Recognize that marketing is an ongoing process, not a one-time contact**
- **Do not have the time or inclination for making personal sales follow up**
- **Need an easy-to-implement hand-holding tool with clients**
- **Want to keep in touch with a large prospect base**
- **Are looking for ways to spread awareness of your firm**

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