

MARKETING

INITIATIVES



**GATEWAY FINANCIAL
PARTNERS**

ADVISOR MARKETING PLAN

The new year is around the corner and our goal as Gateway's Marketing team is to ensure you have all the resources necessary to take your practice to the next level.

In order to accomplish this, we ask that you fill out your marketing plan for this year. We have attached some event "inspiration" to serve as a launch point.

Please return your marketing plan to
marketing@mygfpartner.com

We are excited to get started on
your path to success!

The
Best Marketing
doesn't feel
like Marketing

- Tom Fishburne

1st Quarter



In the space below, please fill in your Marketing Initiatives for this year. This insight will help us by knowing your plans and ideas for the up and coming year. Whether it is as simple as a dinner for your clients or an event like family game night. Go nuts with your ideas! The Marketing Team is here to assist you to help boost your practice. Please feel free to contact us with any questions you may have while filling this out.

January *(New Years)*

example: Get Organized

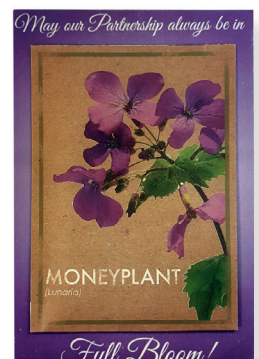


February *(Black history, Valentines Day)*

example: Art Exhibit

March *(Income Tax Planning, Spring)*

example: Spring Cleaning



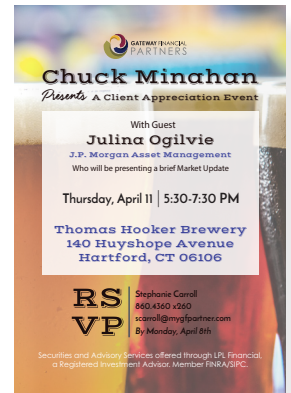
2nd Quarter

Marketing Initiatives

Some initiatives can become an on-going drip campaign, some can be the move that takes your practice to the next level. No idea is too crazy! Make this YOUR YEAR! If you need help or want some suggestions, feel free to email us at marketing@mygfpartner.com or stop by either **Paige's or SJ's office**.

April (Easter)

example: CPA Appreciation



May (Mother's day, Memorial Day)

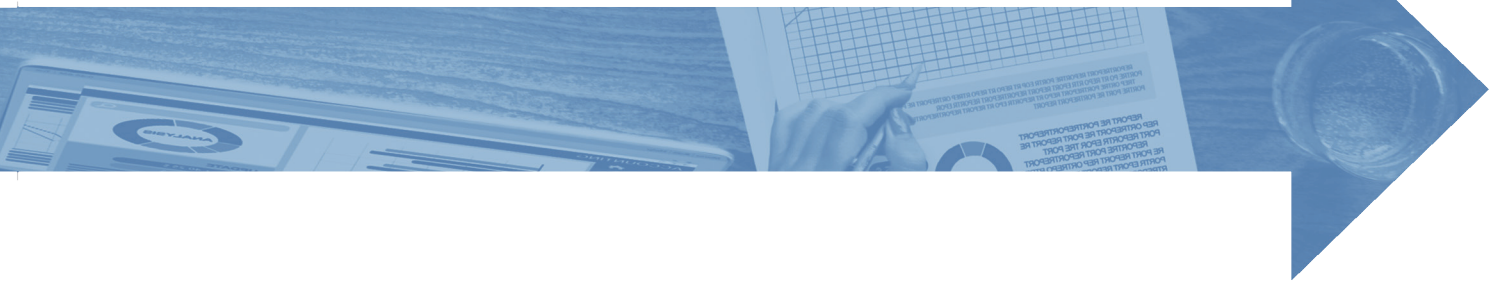
example: College Planning

June (Summer)

example: GFP Meat & Greet



3rd Quarter



July (4th of July)

example: Zoo Event for Clients



August (Back to School)

example: 4th Quarter Push



September (Labor Day, Rosh Hashana)

example: 2018 Planning

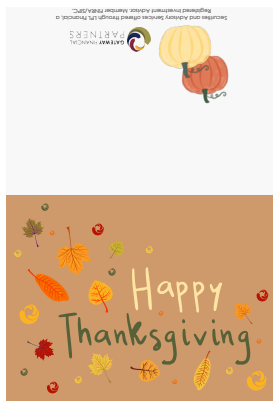


4th Quarter



October (Columbus Day, Halloween)

example: Antiques Event



November (Thanksgiving, Black Friday)

example: Holiday Spending Awareness

December (Christmas, New Year's Eve)

example: Holiday Season



Contact Us

If you have any questions regarding marketing ideas, event descriptions, marketing initiatives, and anything else in general, please feel free to contact anyone from the marketing team. We are here to help and here to help you succeed. No idea is crazy. Please present us with anything you have in mind. We want to make this year a success for you!



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Any marketing request or request forms must be submitted to the marketing email marketing@mygfpartner.com. For any forms, please place "Marketing Request Form" in the subject line.

PLAN

EXECUTE

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**GATEWAY FINANCIAL
PARTNERS**

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