INDIGO Marketing Agency

WELLINGTON
Investment Advisors

Digital Marketing

PLAN

October 2021

Being Radically Relevant

- Who (is your target): Pre-retirees, university faculty
- What (do you do for them):
  - Build personalized portfolios for each client.
  - Use individual stocks (not ETFs).
  - Guide them through the retirement process (such as how to roll money over from an IRA to a qualified retirement account as well as how to access their money after retirement).
- How (do you engage with your target): Provide them with valuable resources and insights on their challenges and remove barriers for them to take next steps.
- Where (those targets spend time): Search (SEO optimized), social media & email.
- When (will you engage with them): See monthly marketing calendar and social media.

Your Marketing
Content Calendar

October 2021	November 2021	December 2021	January 2022
Why I Became a Financial Planner	4 Popular Myths About Financial Planning	Why You Should Not Delay Planning for Retirement	3 Key Retirement Planning Challenges of College Faculty

February 2022	March 2022	April 2022	May 2022
What to Do if the Market Loses Value	Do You Know What Your Investment Statements Are Telling You?	Case Studies of Clients I've Helped	Does a "Second Career" After Retirement Make Sense for You?

June 2022	July 2022	August 2022	September 2022
What We Do and How We Help	The Meaning of a Fiduciary Relationship and Why it Matters	4 Stages of Retirement Planning and a Strategy for Each	See a Sample Financial Plan

Your New Bio

About Paul

Paul Bullock is CEO of Wellington Investment Advisors, an independent, boutique fiduciary firm serving pre-retirees and university faculty across Indiana. With over 32 years of financial experience, Paul is committed to building long-term relationships through thoughtful, personalized investment advice and guidance. He focuses on a disciplined tactical asset allocation approach to money management through a strong understanding of economic and market conditions and strives to build trust with clients by providing sound guidance. Paul understands the hard work his clients have put in to arrive at where they are today and wants to see them succeed in their goals for the future. Paul graduated from the University of Texas with an MBA, as well as a bachelor's degree in finance, and has been dedicated to assisting clients with their financial needs ever since. When he is not working, Paul enjoys time with his family and is also an avid equestrian polo player who helps raise money for over 18 different charities through his playing. To learn more about Paul, connect with him on LinkedIn.

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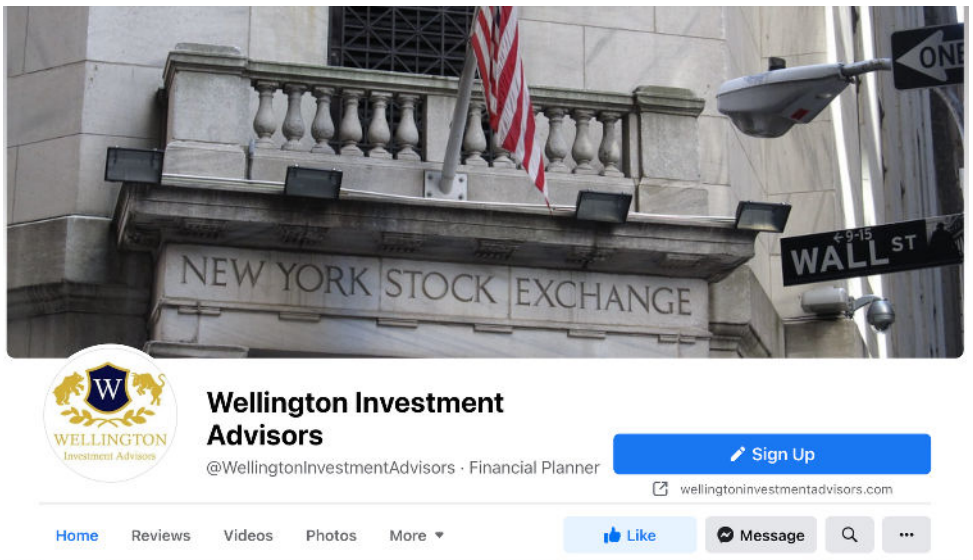
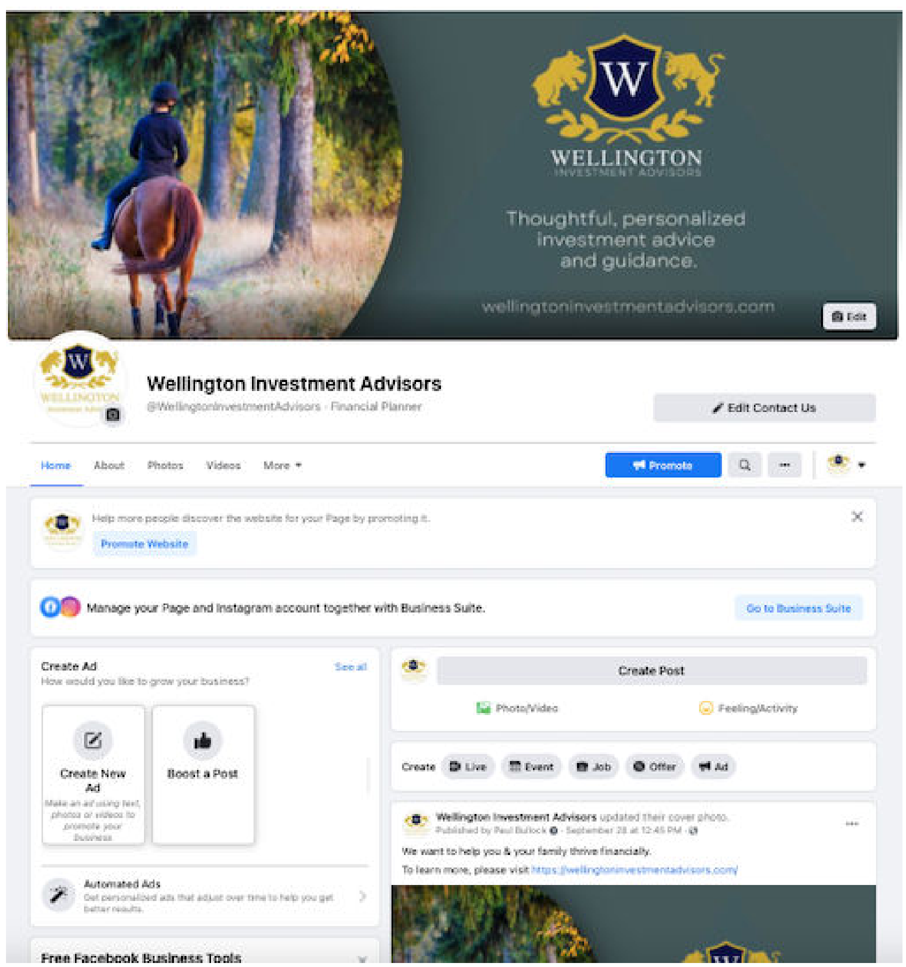
Facebook
Before & After





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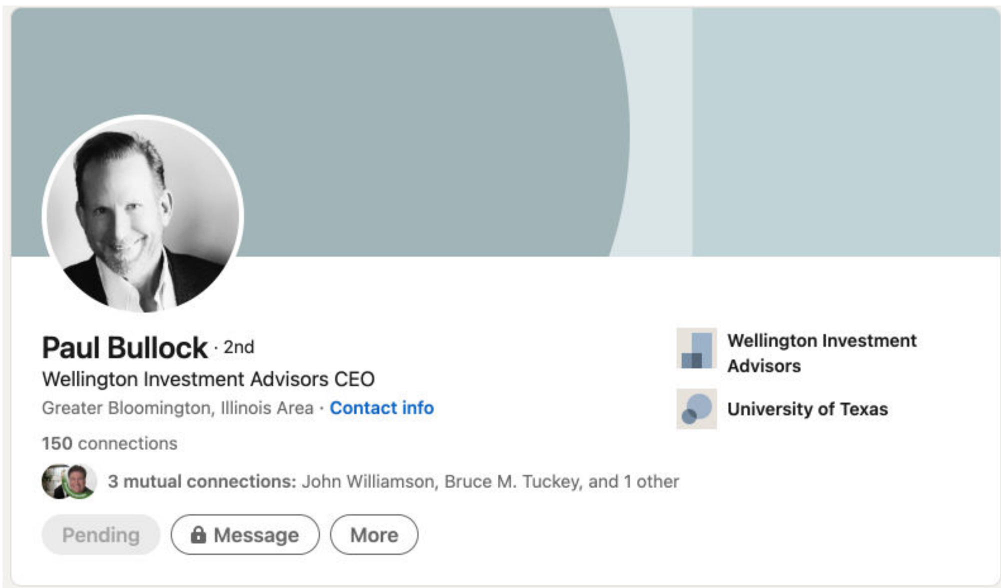
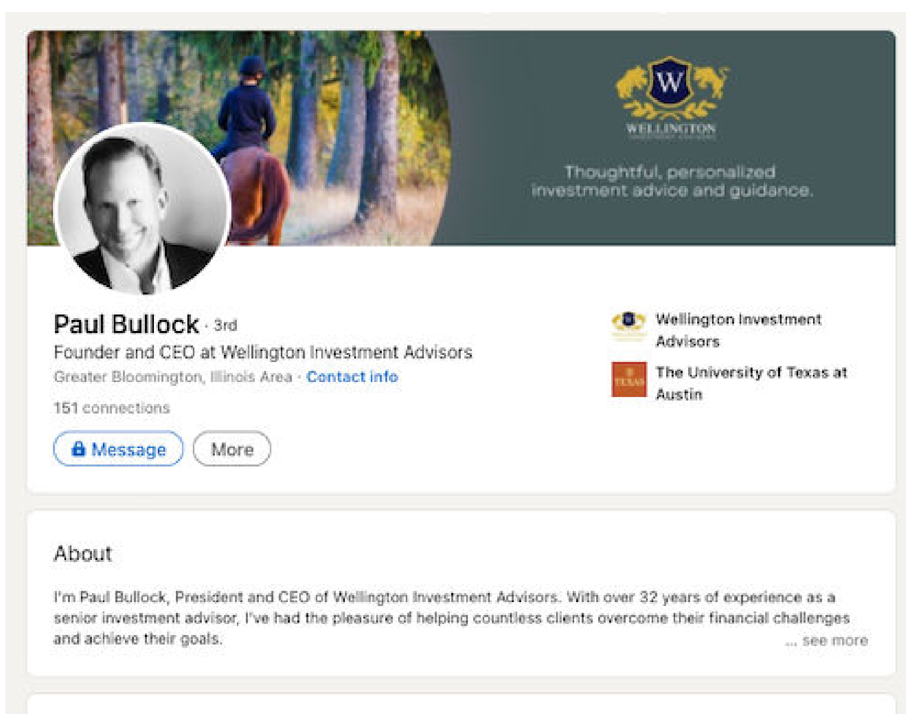
LinkedIn
Before & After





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Twitter
New

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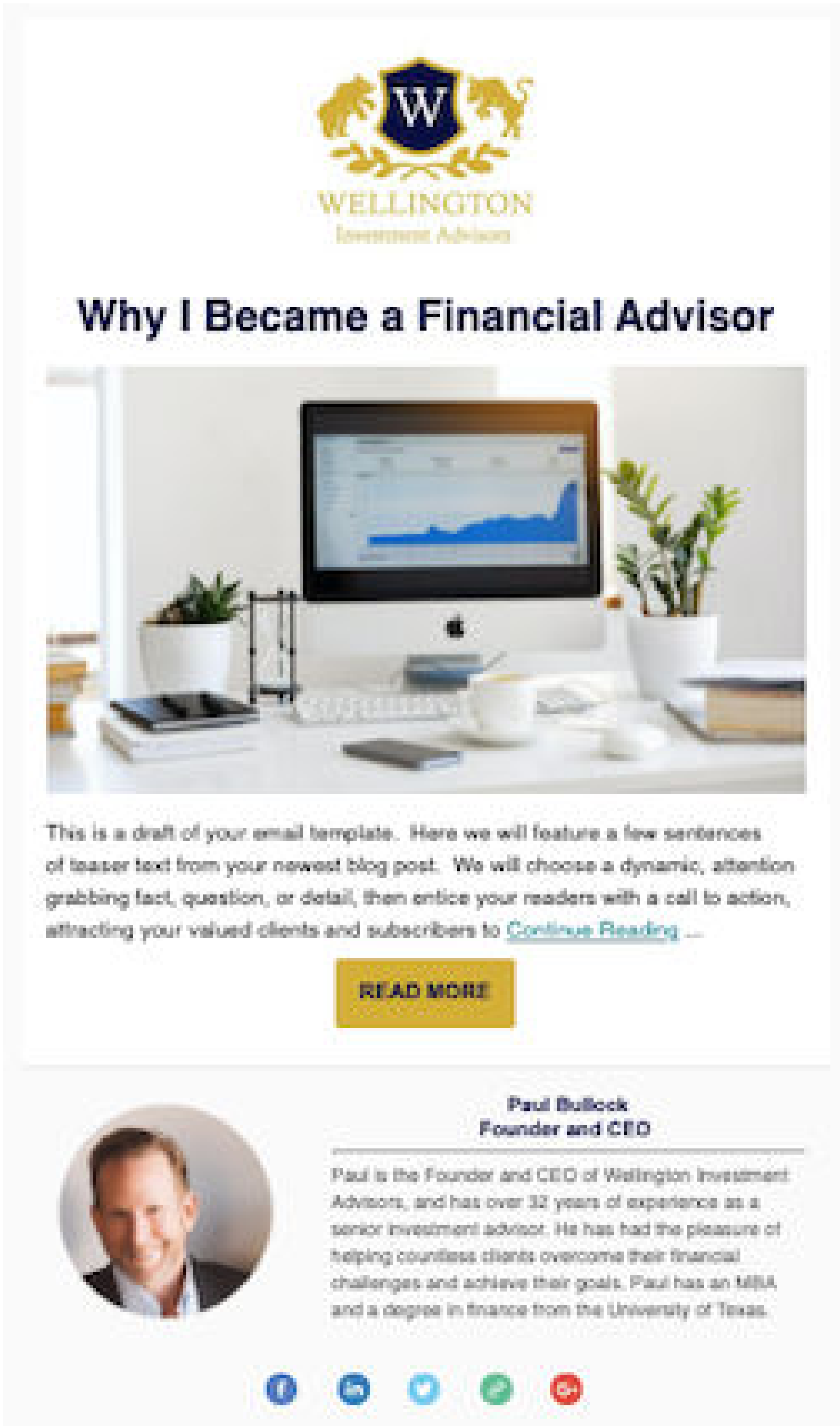
Mailchimp Email Template



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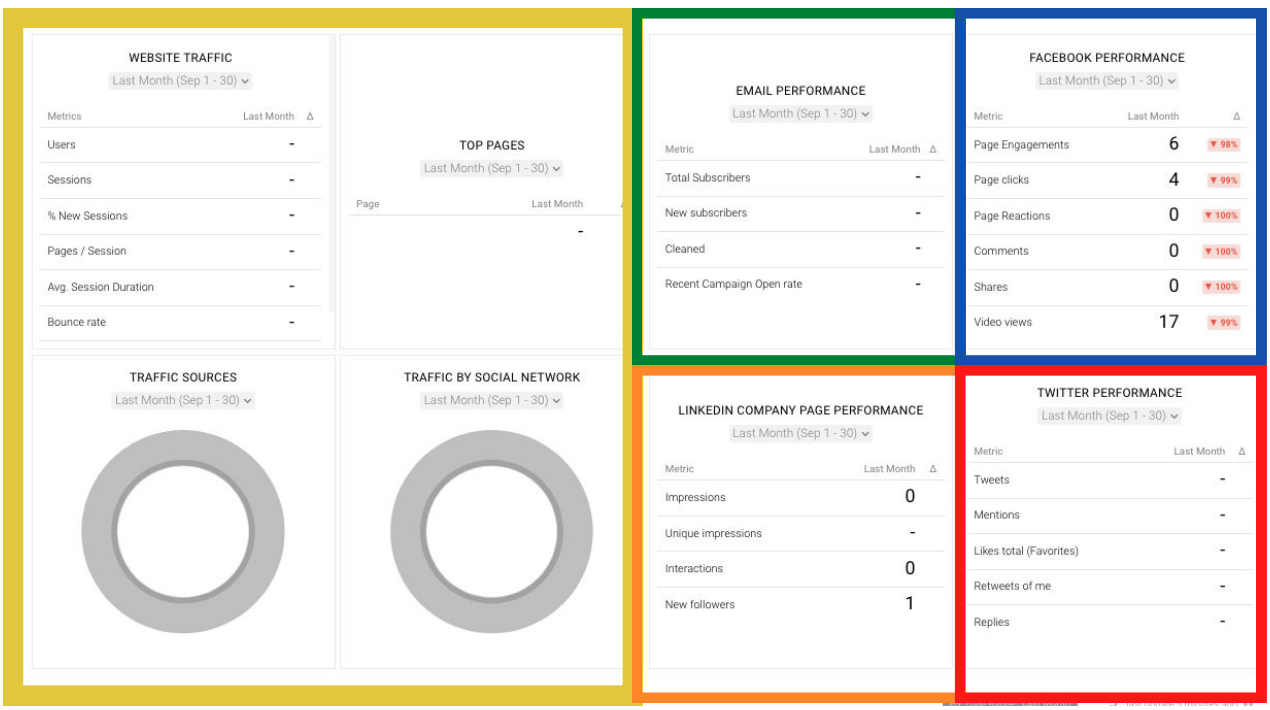
Metrics to Watch

You will receive a monthly report from us with your marketing metrics.
This is your current snapshot before your account is active.



How to Read Your Data Metrics:

Website Data

Email Data

Facebook Data

LinkedIn Data

Twitter Data

*Sample shown has limited data due to most data sources not existing before now.

I N D I G O M A R K E T I N G A G E N C Y . C O M

Your Marketing Goals

- Grow prospects.
- Have prospects watch a testimonial video on the website and schedule a meeting.
- Educate current clients.

Upcoming Marketing Checkpoints

3-Month Actions

6-Month Check-In

12-Month Metrics Meeting

Indigo Marketing Agency Contacts

Onboarding Optimization Manager:
service@indigomarketingagency.com

Your Account Manager:
emily@indigomarketingagency.com

Submit a Support Ticket:
https://indigomarketingagency.com/new-ticket/