

Financial Advisor MARKETING

Digital Marketing Strategies that Work

Earn more revenue and attract more clients you love with done-for-you custom marketing.

Full Service, Done-for-You, Custom Marketing for Financial Advisors

Building a strong marketing foundation for your firm is the key to seeing successful, long-term results. Like comprehensive financial planning, the best results are seen when all of the following factors are in alignment:



Brand Messaging

Clarify your message so customers will listen



Website Copy & Display Optimization

Custom copy and organization optimized for SEO & Conversion



Search Engine Optimization (SEO)

Rank higher than your competition on search engines



Social Media Management

Connect with new potential clients on LinkedIn, Twitter, Meta Business, & Google My Business



Personalized Content

We collect your input each month so your content is fresh & reflective of you.



Paid Advertising

Scale your growth with ads on LinkedIn & Meta Business

Scores of advisors just like you have seen their business grow after hiring **Lexicon Advisor Marketing**.



Step 1

BOOK A **DISCOVERY CALL** TO DISCUSS YOUR OPPORTUNITIES.



Step 2

RECEIVE YOUR **CUSTOM AUDIT & STRATEGY**.



Step 3

GET **RESULTS** AND GROW YOUR BUSINESS!

Your Brand + Lexicon Advisor Marketing = Marketing Gold

SERVICES AND PRICING

Discover What FinGrowth Can Do For You

PHASE 1: THE DISCOVERY & PLAN

FULL MARKETING AUDIT & 12 MONTH STRATEGY (4 WEEKS)

\$5,000

1. FIRST, WE REVIEW EVERY NOOK AND CRANNY OF YOUR MARKETING:

- WEBSITE UX AND DESIGN
- SEO ONPAGE + OFFPAGE
- EMAIL AND SMS MARKETING
- MARKETING AUTOMATION (WORKFLOWS, BOTS, EMAILA, SMS)
- SALES AUTOMATION (SALES PIPELINE, SALES AUTOMATION, ONLINE PAYMENTS)
- GOOGLE ADVERTISING
- SOCIAL MEDIA ADVERTISING
- OPEN WEB ADVERTISING
- SOCIAL MEDIA ORGANIC (FOR BRANDING AND AWARENESS)

2. ONCE WE'VE UNCOVERED YOUR GREATEST AREAS OF OPPORTUNITY, WE REVIEW THE RESULTS WITH YOU AND PRESENT YOU WITH YOUR CUSTOM 12-MONTH DIGITAL MARKETING STRATEGY. YOU CAN HIRE US TO IMPLEMENT THE STRATEGY OR KEEP IT AND IMPLEMENT IT YOURSELF.

PHASE 2: THE BUILD & IMPLEMENTATION

MONTHLY SERVICES & ONGOING OPTIMIZATION

PRICES ARE CUSTOM ESTIMATES BASED ON YOUR 12-MONTH STRATEGY

1. FIRST, WE'LL BUILD OUT ANY INFRASTRUCTURE YOU MAY NEED TO GET STARTED. THIS COULD INCLUDE A WEBSITE, BRAND GUIDELINE, TECH STACK, EMAIL SEQUENCES, AUTOMATED MARKETING SYSTEMS, SOCIAL MEDIA PAGES, MARKETING ASSETS, AND MORE.
2. THEN, WE GET TO WORK IMPLEMENTING YOUR CUSTOM PLAN TO LAND MORE CLIENTS YOU LOVE.
3. ONGOING, WE CONTINUOUSLY MONITOR AND ADJUST SO YOU GET THE GREATEST RETURN ON YOUR INVESTMENT.
4. WE MEET MONTHLY AND QUARTERLY TO REVIEW YOUR KPIS, DOUBLE DOWN ON WHAT'S WORKING, AND DITCH WHAT'S NOT. MARKETING IS AN ONGOING CREATIVE PROCESS BACKED BY DATA-DRIVEN DECISIONS FOR HIGH-PERFORMING RESULTS.

Financial advisors have three main problems when it comes to marketing



They don't know what they don't know



They don't have the in-house support to figure it out



They don't have the time to be doing it themselves



Our program is designed to eliminate all of those problems at a fraction of the price it would cost to hire all these experts in house. To replicate our service, you'd need to hire: an expert writer, SEO technician, email marketer, social media manager, graphic designer, project manager, ad manager, reputation manager, and more...

Plus, working with us gives you access to our tech-forward lead generation system—LeadHawk.

LeadHawk is not offered by any other marketing company in our industry at the current time.

It was specifically designed to streamline and optimize the **lead gen, lead nurture, and appointment setting** process for financial advisors like you.

The benefits?



Less time you have to spend on marketing



Peace of mind knowing your pipeline is always full



Increased revenue to expand, grow, and scale in record time

Our aim at Lexicon Advisor Marketing has always been to take the strain out of marketing, enabling you to focus more on your business—but now we are positioned to help you grow at an accelerated rate.

Last year alone, the clients we manage who opted into our new program saw an average 304% return on their investment with us.

This is not just another software; this is your backstage pass to an upgraded business experience, managed by us, your dedicated marketing team.

Here's how it works

1.

Our primary objective with LeadHawk is to **gather more qualified leads** and convert these leads into scheduled calls on your calendar, taking the heavy lifting off your shoulders so you can focus on what you do best.

2.

As soon as we log into the LeadHawk dashboard, we see a complete landscape of your active opportunities and potential conversion rates. Each of these lives in a meticulously organized opportunity section, custom-built to reflect your workflow.

3.

The real magic of LeadHawk begins when we launch the **lead nurture marketing activities** on your behalf. Our input of leads activates automated campaigns that send out an immediate SMS (SMS is included, but optional), followed by a stream of emails. These activities are built on smart triggers designed to **gently guide leads down your pipeline** and move them closer to their first appointment with you.

4.

The **appointment-setting functionality** in LeadHawk is what truly sets it apart. Let's imagine a lead is ready to book a call with you. They receive an SMS with a direct link to your calendar. They choose a suitable time and day and, just like that, they're booked in. There's no manual back-and-forth, no missed opportunities - just smooth, automated scheduling.

5.

Once the appointment is booked, LeadHawk activates a set of automated reminders and notifications, ensuring that both you and your lead remember the appointment, eliminating no-shows, and keeping your calendar full.

6.

One of the standout features of LeadHawk is its ability to **manage and optimize your social media presence** across Google My Business, LinkedIn, and Instagram. We create customized forms for your website, install chat widgets, and manage your online reputation, all from within LeadHawk.

7.

Imagine having potential clients interact with a **chat widget on your website**. We receive a notification and can respond immediately, offering quick and effective customer service.

8.

Reputation management is also within our scope, where we actively (and compliantly) request and manage Google reviews to bolster your online presence.

This is your **all-in-one solution** to improve your lead generation and appointment scheduling process, while also keeping your current clients happy so they refer more prospects to you.

In other words, FinGrowth is your key to dominating the financial advising sector.

But it's not just about enhancing productivity; it's about bringing a new level of transparency, nurturing potential leads, and ensuring your calendar stays packed in less time than organic marketing work alone.

This is all to say...

Ready to put FinGrowth and LeadHawk to work for you to revolutionize the way you scale?

Schedule a Strategy Call with me today to discuss your opportunities.

