

# ACA Marketing Resources Guide



## Core Tools - Marketing

### Successful Marketing Manual

This [manual](#)\* walks you through the marketing cycle, developing your marketing plan, using the ACA Marketing Tool Kit and a variety of other marketing topics. \*included in the new member Welcome Box or available for download or purchase.

### ACA Marketing Tool Kit

[Three professional design templates](#) of a sell sheet, business card, letterhead, and more (designs correlate with Web Brochures). Design files available to your printer/designer via FTP.

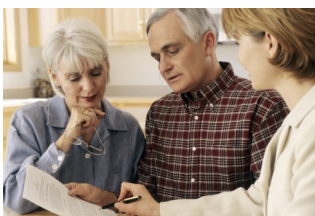
### My Marketing Workbook

This [Excel workbook](#) helps you plan your marketing efforts and track your results. Containing both forms and marketing reference material, it provides everything you need to organize your marketing and keep your eye on the big picture as you grow your practice.

### Web Brochure Program

ACA designs and hosts semi-custom web brochures for its members, at no additional charge, based on the design templates referenced above. These web brochures include links to resources on the ACA national web site, a drip email program and site usage statistics. For more information, including a web brochure order form, visit [www.cambridgeadvisors.com/cadv/templates](http://www.cambridgeadvisors.com/cadv/templates). Note: additional customization of both design and content is available for an additional fee.

## Get Clients Now!



ACA members have found the Get Clients Now! program very helpful in planning and executing their marketing activities. That's why we provide this book to all new members. But don't limit yourself only to reading.

### Prospective Client Log

[Excel spreadsheet](#) for tracking activity with prospective clients.

### Samples

[New Client Letter](#)

[Preliminary Appointment Letter](#)

[Press Release](#)

[Thank you notes](#)

[Yellow Page Ads](#)

### 7 Secrets Workbook

Used in conjunction with the web brochure drip email program or as a stand-alone tool, this [workbook](#) offers practical advice and exercises for consumers to evaluate whether they are on the road to financial independence.

### Evaluate Your Financial Fitness

[One page sheet](#) to help prospects gauge their financial fitness level.

### Personal Planning Profile

This [tri-fold brochure](#) assists you in getting a snapshot of the client's financial picture.

### Start a Get Clients Now! Support Group

Any ACA member can form a Get Clients Now! accountability group or join a group facilitated by Arlene Moss, a licensed Get Clients Now! facilitator. Share marketing ideas, successes and failures with your ACA peers. Be held accountable for your marketing commitments and help others be accountable for theirs. Marketing doesn't need to be a lonely endeavor.

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## Recordings

The ACA libraries hold a wealth of marketing information from past calls, presentations and conferences. Consider listening to the following:

### ACA Success Program

[Marketing Fundamentals - May 2006 Virtual Classroom](#)

[Understanding Why Clients Buy—May 2006](#)

### 2007 Conference (San Diego) - Presentations

[Best Marketing & Practice Management Ideas](#)

[Signing Up New Clients & Actually Closing Them](#)

### 2008 Conference (Nashville) - Presentations

[Creating Publicity Through Media Rapport](#)

[New Media & Your Practice](#)

### 2009 Conference (Clearwater) - Presentations

[Marketing, Social Media and More](#)

## Other Resources

### Advisor Sharedocs

See how your ACA peers have adapted ACA tools and what they have created on their own. Letters, articles, presentations and more—you may find just the marketing item you need.

### Professional Coaching

Turbo charge your marketing efforts by participating in group coaching programs on learning how to effectively express what you do and building your referrals.

## Questions?

Contact Arlene Moss with questions about the tools and resources listed.

888.834.6333 ext. 704

[arlenem@acaplanners.org](mailto:arlenem@acaplanners.org)

## Marketing

[Conducting an Effective PR Marketing Campaign](#)

[Crafting Your Message so People Want What You Do](#)

[Creating Your Signature Talk](#)

[Designing an Effective Marketing Campaign](#)

[Developing a Public Relations Plan](#)

[Let the Community Know What You Do](#)

[Putting Together an Effective Marketing Brochure](#)

[The Referral Mastery Program](#)

[Using the ACA Newsletter in Your Business](#)

[Personal Marketing - Taking the Fear Out of Developing New Clients](#)

[The Good, the Bad and the Ugly of Paid First Appointments](#)

[Guide to Using LinkedIn](#)

### Market Your Practice Call Series:

- [Blogging](#)
- [Conducting Seminars](#)
- [Paid 1st Appt](#)
- [Converting Paid 1st Appts](#)
- [Repurposing](#)
- [Client Referrals](#)
- [Professional Referral Techniques](#)

### Financial Focus

This quarterly newsletter is written by fellow ACA members for distribution to ACA-member clients and prospective clients. Use the ACA version for free or pay a small fee to customize with your company logo, contact information, and colors.

### All-Member Calls

Several times a year ACA hosts a teleconference or webinar on a topic related to marketing your practice. Join the live event or listen to the recording when it's convenient for you.

### Resource Partner Directory

Find other marketing resources that your ACA colleagues have found helpful—consultants, designers, coaches, and more.

