

STREETWISE ADVISORS

A Unique & Powerful Marketing Tool for
Financial Advisors and Wealth Managers

Presented by Sydney LeBlanc & Company

Streetwise Advisors

The Concept

- ❖ Streetwise Advisors is a custom (hardcover) book that provides an objective, third-party endorsement for financial advisors and wealth managers;
- ❖ It is a powerful marketing tool that is educational and not-self serving;
- ❖ It adds instant credibility without undertaking the costly and laborious task of writing an entire book;
- ❖ It also provides a way for advisors to showcase their skills and experience to their prospects and clients in a clearly objective fashion because the book is authored by a veteran financial industry journalist.

Streetwise Advisors

Description

- ❖ The book is approximately 200–250 pages and contains 10–15 chapters;
- ❖ Each chapter is approximately 12–16 pages long and features a complete profile of an advisor and his/her team;
- ❖ Contact information is included at the end of each chapter;
- ❖ An attractive 4–color dust cover is provided;
- ❖ It can be customized with an individual photo or the advisor can choose a universal design;
- ❖ Cover price is \$34.95.

Streetwise Advisors

Your chapter will include...

- ❖ Comprehensive profile of you and your team;
- ❖ Detailed description of your key processes including investment / wealth management, client service, etc.;
- ❖ A compelling explanation of what differentiates you and/or your firm from the competition;
- ❖ Areas of specialization;
- ❖ Types of clients you work with;
- ❖ Case studies;
- ❖ Contact info and photos.

Streetwise Advisors

Benefits

- ❖ Serves as a third-party endorsement of you and/or your team members and the way you conduct your business;
- ❖ Serves as a business-builder, provides added credibility and awareness of your skills to prospects;
- ❖ Enhances your public relations value and creates awareness to the media about you/your team;
- ❖ Empowers your clients and centers of influence to send you referrals (by providing them with copies);
- ❖ Establishes credibility among new centers of influence you would like to do business with.

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Public Relations Included

- ❖ To maximize your ROI of participating in Streetwise Advisors, we will:
 - Write a custom press release for you to send to your local and regional media;
 - Write and send a general press release about the book to the trade media;
 - Send a copy of the book to the trade media.

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Eligibility Requirements

- ❖ You or one of your principals must have been active in the investment industry for at least seven years;
- ❖ You must derive at least 70% of your revenues from fee-based services;
- ❖ You must not have any unexplained derogatory information on CRD reports;
- ❖ You should have at least \$100MM in assets under management (\$200MM for teams);
- ❖ You must be able to explain your core processes including investment / wealth management and client service;
- ❖ You must get the approval of your compliance department (if needed) prior to signing the agreement.

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Our Process

- ❖ Author will interview up to three team members – approximately 2 hours, less if all are on the same interview call;
- ❖ After the chapter is written it will be sent to you for edits and changes;
- ❖ Author will implement your changes and send the chapter to you for a final review;
- ❖ Once the final edits are approved, you will need to send it to your compliance department for approval (if required).

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Your Investment

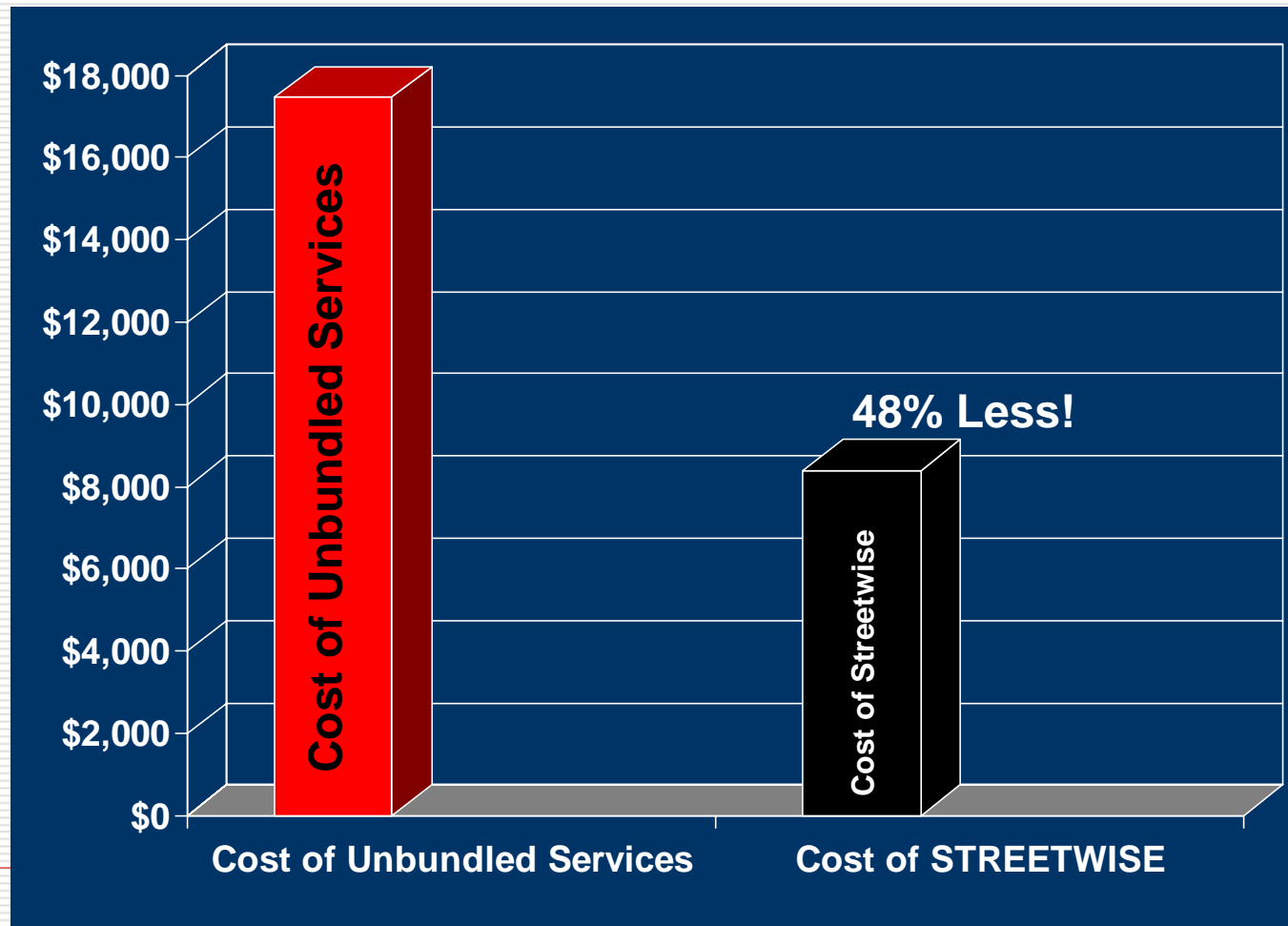
- ❖ \$8,400 includes 300 hard cover books and the following services:
 - ❑ Interview with you and/or team members
 - ❑ Chapter draft of approximately 6,000 words
 - ❑ Two chapter draft edits after your review
 - ❑ Final chapter for your approval and compliance submission
 - ❑ Design, layout and production of your chapter and/or cover
 - ❑ PDF of your chapter for your website or mailing purposes
 - ❑ Three hundred (300) copies of the book with custom color cover shipped to you
 - ❑ Custom press release for your distribution to local and regional media
 - ❑ Press release and book mailing to financial trade media on your behalf
 - ❑ Placement on Amazon.com and BarnesandNoble.com
 - ❑ Two hours of complimentary PR and marketing coaching

To get a 5% professional discount, mention that you heard about Streetwise Advisors through the Advisor Resource Alliance (ara360.com)

Streetwise vs. Unbundled Services

- ❖ The typical fee for hiring a professional writer is at least \$1 per word, so a 6,000 word chapter would cost \$6,000+
- ❖ The hourly rate for public relations runs \$100–300 per hour, so 2 hours of PR would cost \$200-600;
- ❖ The cost of buying 300 hardcover books separately at cover price of \$34.95 would be \$10,485;
- ❖ A press release written for your local and regional media would run aprox. \$400;
- ❖ Total investment for unbundled services: \$17,000++

The Streetwise Advisor Advantage



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Summary

- ❖ In the current economic climate where advertising and PR budgets are lean, consider and compare the cost of writing, design, production, and printing of most 4-color collateral pieces, newsletters or booklets to the investment in a book chapter and 300 copies of Streetwise Advisor;
- ❖ The participation in a book project is added credibility to your current marketing pieces (through a third party endorsement), and it's more cost effective as well!
- ❖ **STREETWISE ADVISOR IS YOUR SOLUTION!**

Streetwise Advisors

For more information...

- ❖ Please contact Sydney LeBlanc at sleblanc@qualifiedmedia.com
- ❖ 760.929.1301
- ❖ We look forward to working with you!

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