



Personal Brand Building Guide

Your step-by-step guide to getting ahead and winning business.

ascensus.com



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Looking for a specific tactic, tip, or template?

This guide lets you jump between sections and stay as high-level or get as granular as you'd like. From [LinkedIn post best practices](#) to a [sample marketing plan](#), find exactly what you need to take your business to the next level.



What Makes a Strong Brand

The power of a strong brand

Pretend you're in the market for a new car. If you were presented with these brands, what are your first thoughts?



When looking at these options, we wouldn't be surprised if you thought something along the lines of:

"A Volvo is **safe**, a Ford is **tough**, and a BMW is a **status symbol built to last**."

And that's because these car manufacturers have strong brands—they clearly defined their target customers' specific need and centered their brand identities around the characteristic that answers that need.

When a business owner needs a financial advisor, let's make sure they think of you.

With this guide, you'll establish your personal brand by:

- Defining your target audience(s)/discovering new ones
- Capitalizing on your strengths
- Comparing your message to your competitors' to ensure you stand out
- Effectively marketing your personal brand in ways you might not have considered

Why personal branding?

WHAT IS A BRAND?

A distinct identity created through elements of design, advertising, and communication that distinguishes a product or service from its competitors.

WHAT IS A PERSONAL BRAND?

A brand that defines and promotes who you are, what you value, and your purpose or your “why.” It communicates what you bring to the table by summarizing the experiences, skills, and values that differentiate you. Think of it as your professional first impression.

WHY IS PERSONAL BRANDING IMPORTANT?

It can be a challenge to win business in today’s increasingly competitive landscape—but a personal brand can help you differentiate yourself and your services. Plus, personal branding:



Is highly profitable

Personal brands drive **more than 2/3 of Americans** to spend more money.*



Facilitates influence

82% of Americans agree companies are more influential when their executive has a personal brand they know and follow.*



Builds trust

74% Americans are more likely to trust someone who has an established personal brand.*

Let's get started

Building your personal brand is easier than you might think. We’ve taken out the guesswork with the Personal Branding Venn Diagram, and this guide will help you fill it out step by step.

Step 1 will help you define what your customers want—and how you can speak to them in a way that resonates.

Step 2 will help you visualize what your competition lacks/does well—and where you can shine.

Step 3 will define your personal strengths and skills—so you can build an authentic brand that’s unique in your space.



*Kevin Graham. “Personal Branding: How to Make An Impact and Build Authority Online.” June 6, 2023.



Building Your Personal Brand

STEP 1: Find your niche

Mid-sized businesses with many employees near retirement age are clear prospects—which means competition is most intense for their business. To stand out in less saturated spaces, you can look to underserved niche demographics:

WEALTH CLIENTS



Millennials

Provide guidance for a highly entrepreneurial generation who might not know the full range of their employer's investment options.



Women

Speak to the specific financial challenges and risks women face.



Socially conscious

Provide ways for savers focused on environmental, social, and governance (ESG) investing to bring those practices into their retirement planning.

Did you know:

70%

of top financial advisors (those who earn \$1 million or more annually) focus on niche clients?*

RETIREMENT PLAN CLIENTS



Industry

Each industry experiences their own trends and challenges that make sense for certain retirement strategies and products.



Plan size

Each plan size comes with its own special needs. For instance, small plans may require more participant education, whereas large plans may need more investment monitoring or plan compliance oversight.



Business size

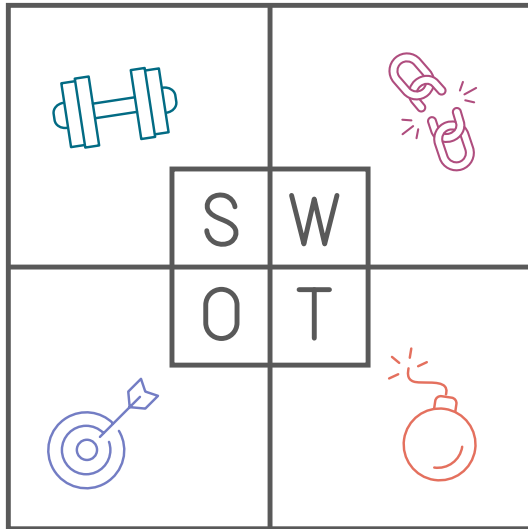
New or small business owners have specific, complex financial and retirement planning needs and tax structures. They may not have a retirement plan in place yet and will look to their advisor for guidance and reassurance.

* "10 Takeaways From a Changing RIA Industry in 2023." Docupace, 2023.
www.docupace.com/wp-content/uploads/2023/03/10-Takeaways-From-a-Changing-RIA-Industry-.pdf.

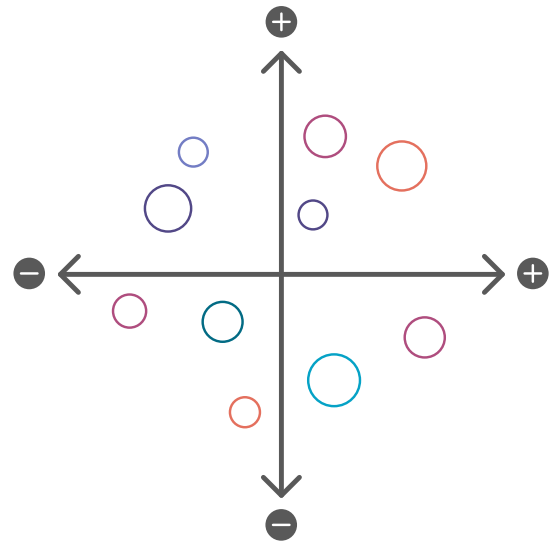
STEP 2: Identify your competition

Getting a sense of where your competitors are can help you position your personal brand in a unique space, giving you a competitive edge. These two tools can help you define and visualize your competitive landscape:

SWOT ANALYSIS



PERCEPTUAL MAP



SWOT ANALYSIS

SWOT analysis, or strengths, weaknesses, opportunities, and threats, helps you understand your strategic position within the industry and how you can capitalize on your advantages. Strengths and weaknesses are specific to you and your company; opportunities and threats refer to the larger industry as a whole. We've included some questions to help get you started.



STRENGTHS

Your advantages

- What do you do better than other financial advisors?
- What works best when working directly with clients?
- What is it about your hard skills or processes that make your stand out (e.g., your intake process, your financial planning process, your access to plan types, etc.)?
- What would your competitors say are your strengths?

WEAKNESSES

Areas to improve



- What parts of the process can you improve upon (e.g., prospecting for new clients, landing large clients, client retention, etc.)?
- If you've lost clients in the past, what was the reason?
- What marketing messages are getting lost?
- What personal or leadership skills can you improve?

SWOT ANALYSIS



OPPORTUNITIES

Where to apply your advantages

- Are you maximizing referrals? Can you find new, creative ways to get them?
- Can you take advantage of technology to improve workflow (e.g., ChatGPT, automation)?
- Do you have a website that engages clients and prospects, and are you maximizing its return to you (e.g., search engine optimization (SEO))?
- What major social changes or pop culture conversations are happening that you can leverage to create fresh, relevant content?

THREATS

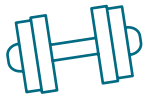
Where you are at risk



- What obstacles do you face in this industry?
- Are there any governmental regulations that pose a challenge or could in the future?
- Do you need to protect yourself from unexpected circumstances (e.g., if an investment goes wrong)?
- Are you properly using new technology? How will artificial intelligence (AI) change your business? Is your data secure?

YOUR SWOT ANALYSIS

Based on the [SWOT analysis questions](#) on the previous page, write down your strengths, weaknesses, opportunities, and threats.



STRENGTHS

Your advantages

WEAKNESSES

Areas to improve



YOUR SWOT ANALYSIS



OPPORTUNITIES

Where to apply your advantages

THREATS

Where you are at risk



PERCEPTUAL MAP

A perceptual map is a graphic used to illustrate where a product, service, or brand and its competitors are positioned according to consumer perception (see car brands example below).

Axis values: Two characteristics that your target audience considers when purchasing your product or service.

- Example: *Price and social capital*

Axis ranges: The opposite sides of each axis value.

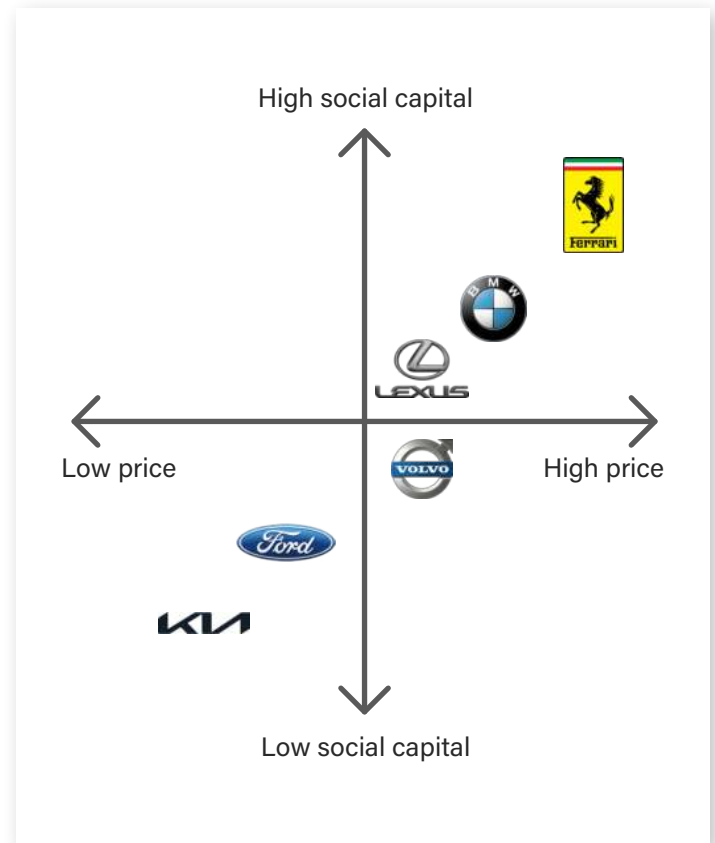
- Example: *Price is low to high and social capital is high to low.*

Competitors: Other companies who offer similar products or services and who your target audience is likely also considering.

- Example: *Ford, Volvo, BMW, Ferrari, Lexus, and Kia*

Competitors are placed on the map based on how the target customers likely perceive them based on the combination of chosen characteristics.

In this example, for instance, Kia typically carries a more affordable price and the least societal social capital, so it would be placed on the “low” end of both axes. Compare that to Ferrari, whose incredibly high price and social capital place it in the upper-right hand corner, the “high” end of both axes.



YOUR PERCEPTUAL MAP

Now create your own perceptual map.

1. Based on the niche you defined in [step 1](#), choose the two characteristics your niche values most in a financial advisor.

Axis values

_____ and _____

2. Then list the range values associated with each characteristic.

Axis range for:

_____ to _____

Axis range for:

_____ to _____

YOUR PERCEPTUAL MAP (CONTINUED)

3. Use your industry knowledge to make a list of your competitors (up to 10).

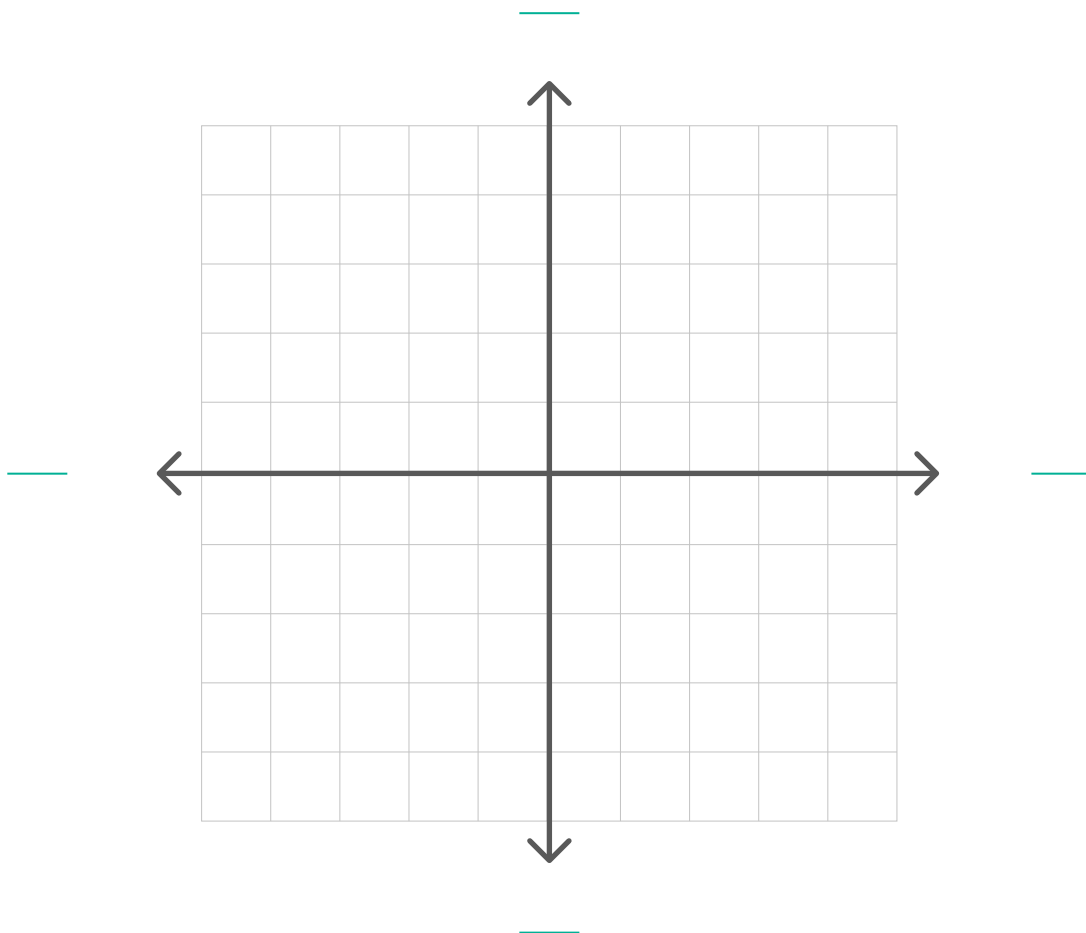
- | | |
|----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |

4. Your competitors are numbered. You can think of these numbers like the logos from the car example. Place each competitor's number in the perceptual map squares below, based on how your target customers perceive each in terms of the axis characteristics you've chosen.

5. Mark your target customers' perception of you on the map with an **X**.

6. Analyze:

- See if you're duplicating marketing messages. Are you overlapping or too close to a competitor?
- See where there's a gap. Could you move to a more favorable or unique space by adjusting one of your characteristics?



STEP 3: Define your edge

The key to an effective personal brand is authenticity. So it's important to incorporate what's true to you and makes you different. Answer these questions, which will serve as the core of your brand:



Which three to five adjectives best describe me?



What do I do better than anyone else? What are my personal strengths?



What am I passionate about?



What gives me energy/motivates me? What inspires me?



What is/are the most interesting thing(s) about me?



In what areas do people usually ask me for help?



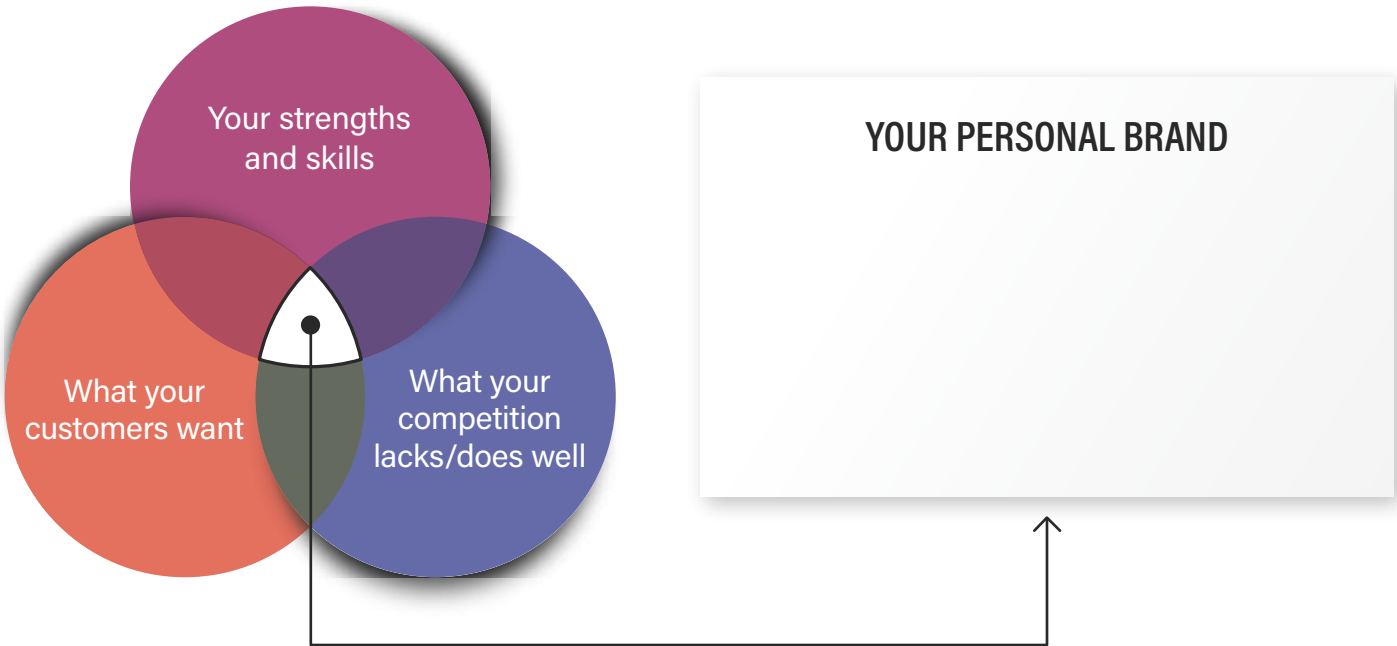
What are my key accomplishments and successes?



What value can I offer to my community? To my colleagues and network? To my industry?

Put it all together to uncover your personal brand

Your personal brand is basically a promise—what you promise to deliver to your audience with every interaction—while highlighting what sets you apart. It's why they should choose you.

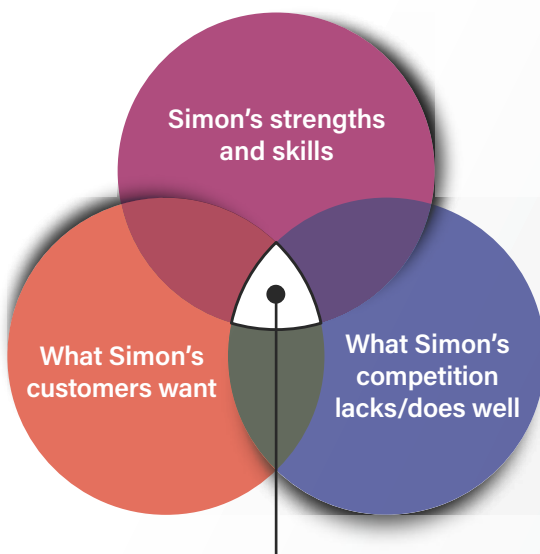


| Your strengths and skills | What your customers want | What your competition lacks/does well |
|--|--|--|
| <div></div> <p>(answers from step 3)</p> | <div></div> <p>(answers from step 1)</p> | <div></div> <p>(answers from step 2)</p> |

PERSONAL BRAND EXAMPLE: SIMON SINEK

Simon Sinek is a world-renowned author and motivational speaker—but he wasn't always that way. In fact, with an estimated 40,000 professional speakers and 50,000 authors in the United States,* Simon could have become just part of a statistic.

However, by building a personal brand that centered on his ability to communicate motivation and optimism in novel ways, he was able to launch himself into the public eye and build his brand into a diversified company, now known across the world and worth \$18 million.



SIMON'S PERSONAL BRAND

Using optimism to inspire people to do the things that inspire them.

Simon's strengths and skills:

- Writing
- Public speaking
- Helping others
- Long-term thinking
- Building connections

What Simon's customers want:

- Source of inspiration
- Motivation
- A plan to get to the next stage in life

What Simon's competition lacks:

- Focus too heavily on product rather than people
- Similar, traditional views

What Simon's competition does well:

- Video content
- First-hand business and leadership experience

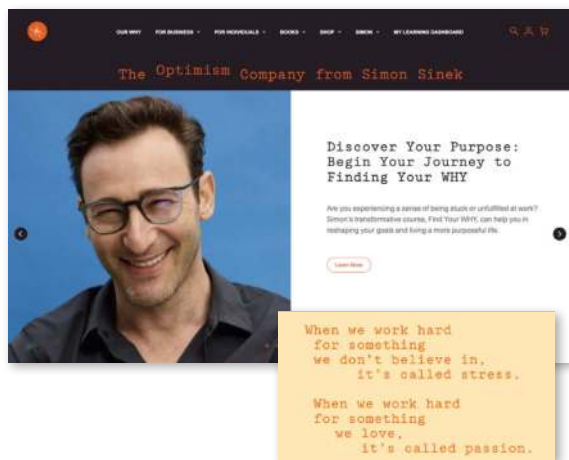
The use of Simon Sinek's likeness is not endorsed by Simon nor the Optimism Company. Learn more about Simon Sinek and his personal brand at www.simonsinek.com.

*John LaRosa. "U.S. Motivational Speaking Industry Worth \$1.9 Billion." MarketResearch.com. March 2, 2020, and "Author Statistics." Wordsrated.com. February 16, 2023.

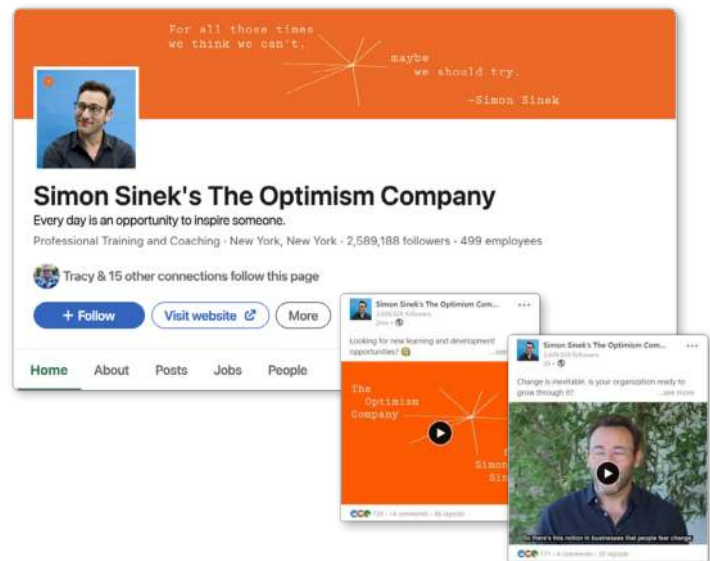
PERSONAL BRAND EXAMPLE: SIMON SINEK (CONTINUED)

You can see how Simon's personal brand comes through in every asset of his marketing strategy.

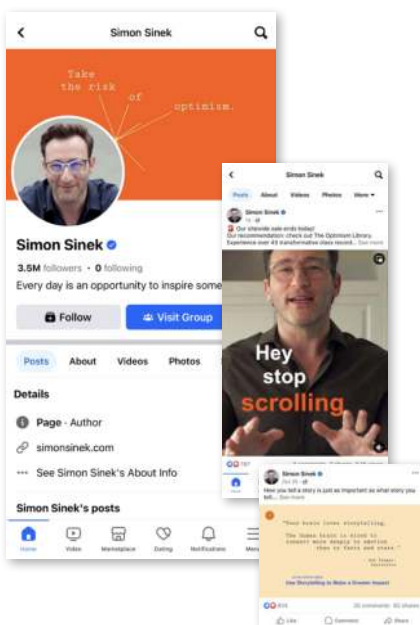
Website



LinkedIn



Facebook



Instagram



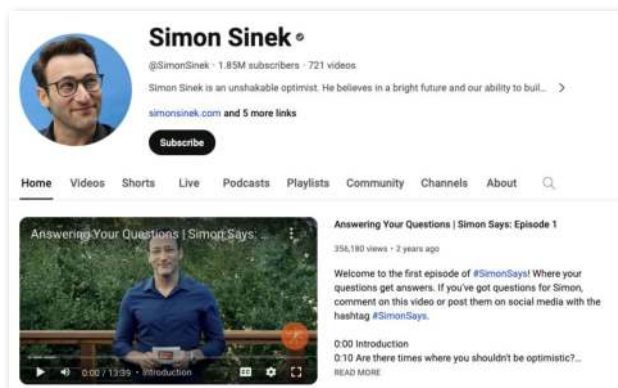
x (formerly Twitter)



TikTok



YouTube



Email banner



The use of Simon Sinek's likeness is not endorsed by Simon nor the Optimism Company. Learn more about Simon Sinek and his personal brand at www.simonsinek.com.



Marketing Your Personal Brand



NOTE: It is your responsibility to ensure you are compliant with the public marketing and advertising policies, procedures, and guidelines set forth by your firm and by [FINRA](#). Review these rules and procedures before undertaking any of the initiatives listed in this guide.

Define your marketing goals

Now that you have your personal brand, how can you *effectively* market it?

SMART GOALS

Many marketing goals tend to be vague—it's common to hear goals like “improve brand reputation” or “increase revenue.” However, learning to develop SMART goals is a way to more clearly define your marketing objectives to improve your likelihood of success.

Example: *I want to bring in 20 new leads by the end of the quarter by carrying out an email campaign.*

| | | |
|----------|--|--|
| S | Specific Clear statements that include precise details. | Example: <i>I will send one email per week to remain top of mind and build rapport. I will differentiate the subject lines of each send to test effectiveness.</i> |
| M | Measurable Targets that you can calculate and track over time. | Example: <i>I will quantify a “lead” by an introductory meeting being scheduled.</i> |
| A | Attainable Aims that are challenging but achievable given your time frame and resources. | Example: <i>I already send out emails, so I have the infrastructure in place to send them out more frequently.</i> |
| R | Relevant Support your mission, vision, and priorities. | Example: <i>Currently, I average 10 leads per quarter without active email marketing. It's realistic that I could double these leads by getting my name out there more often.</i> |
| T | Time-bound Have a specific deadline or time frame. | Example: <i>By the end of the quarter—within the next 3 months.</i> |

Develop your elevator pitch

This is your bread and butter—how you'll package your personal brand to help achieve your marketing goals. This is what you'll come back to for any type of marketing or outreach to ensure your brand is consistent and targeted.

You can use it:

- In your social media posts
- To pull keywords from it for your website, if you have one
- For outreach (calling, emailing) to build consistency
- As talking points for unexpected encounters
- When reaching out to prospective clients and/or to build alliances



CREATING YOUR ELEVATOR PITCH

1. Grab attention with:

- An empathetic question (*"Do you have a financial worry that keeps you up at night?"*)
- A striking statistic (*"X% of Americans agree that they are not on track to retire comfortably."*)
- Social proof such as reviews, testimonials, past results (*"I have helped my # clients save an average of #."*)
- A personal anecdote, opinion, or belief (*"From the # years I've worked as a financial advisor, I've learned that trust is the most important aspect to my business."*)
- Stating your target's pain point (*"Are you struggling to retain top talent with your current retirement benefits structure?"*)

Your attention-grabbing opener:

2. Using your Venn Diagram on page 14, create a personal value statement.

- *"I can help you achieve [**what your clients want** + **what your competition lacks**] through [**your strengths and skills**]."*

Your personal value statement:

3. End with a call to action that includes *how* and *when* you want clients to contact you.

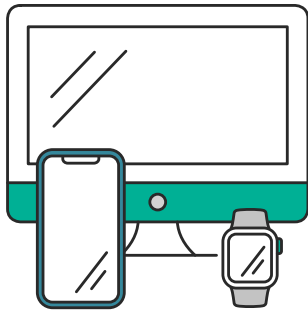
- *"Contact me at XXX-XXX-XXXX to learn more about how we can maximize your retirement plan tax savings."*

Your call to action:

Elevator pitch examples

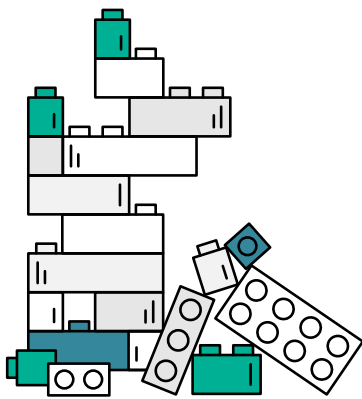
Color key:

- Your strengths and skills
- What your customers want
- What your competition lacks



Apple

"We believe that we are on the face of the earth to make **great products** and that's not changing. Our mission is to bring the **best user experience** to customers through **innovative hardware, software, and services**."¹



Lego

"We strive to consistently deliver experiences that embody the **spirit of our brand name**, which is derived from the words "play well" in Danish. By **creating fun experiences inspired by our unique building system** that combine logic and reasoning with playfulness and imagination, we **prepare our playful learners for life**."²

¹ "Apple Mission Statement, Vision, & Core Values (2023)." Business Strategy Hub. 2023. <https://bstrategyhub.com/apple-mission-statement-vision-core-values/>.

² "The LEGO® Brand Values." The LEGO Group. 2023. <https://www.lego.com/en-us/aboutus/lego-group/the-lego-brand?locale=en-us>.



Marketing Plan Resources

LinkedIn

UPDATE YOUR PROFILE WITH YOUR PERSONAL BRAND

LinkedIn is a popular way financial advisors and TPAs connect with potential clients, build relationships, and drive referrals. Having an optimized profile that clearly communicates your personal brand can help you stand out in the crowded social media landscape. A strongly branded profile can also help foster trust by communicating your authenticity.

And it only takes a few simple steps:

- **Update your profile photo** – You want this to be a professional headshot, but also capture some of your personality. Consider a background, outfit, or pose that speaks to you.
- **Add a relevant banner photo** – This is an extension of your profile photo. Consider featuring a client testimonial, an award you've won, a short list of your personal strengths, or an image depicting your target niche.
- **Write a profile summary** – Make sure this relates to the elevator pitch you developed earlier in this guide to tie all your personal branding elements together.

OPTIMIZE YOUR LINKEDIN POSTS

Now that you've built a strong LinkedIn foundation—an engaging profile that speaks to your personal brand—it's time to use it to build your professional reputation. While LinkedIn posting might feel like a time-consuming burden, there are simple, quick tweaks you can make for a more effective strategy.

- **Post content that's relevant to your niche** – You identified your target individual or business in [step 1](#). Establish yourself as a credible authority by sharing helpful articles, insights, or tips that are relevant to your niche. If you're not sure where to start, [our resources](#) on page 29 of this guide can help.
- **Post multiple times a week** – While this might sound like a lot, you can use [LinkedIn's scheduling feature](#) to schedule your posts up to three months in advance—so on days when you have more time, you can generate weeks' worth of content and set it to auto-post, enabling you to focus on the other aspects of running your business.
- **Make your posts stand out visually** – Have you tried [Canva](#)? This free, easy-to-use platform lets you design your own posts or plug your copy into pre-designed templates.

POSTING FREQUENCY

The more you post, the better.
Aim for a minimum of once weekly;
2–3 times weekly is ideal.

33%

of financial advisors using LinkedIn for prospecting gained \$1 million or more in assets under management over 12 months. 12% gained \$5 million or more.*



LinkedIn (continued)

TAKE YOUR PROSPECTING TO THE NEXT LEVEL

Take advantage of the lesser known tools on LinkedIn to generate more—and higher quality—leads.



LinkedIn Groups – Groups is LinkedIn’s version of digital networking. There are many groups that feature financial professionals. Join a few to make new contacts, get new content and marketing ideas, build partnerships, and more. You can also treat Groups as a prospecting tool by searching keywords that are specific to your niche, such as “retired,” “young professionals,” or “HR representatives.” By joining these Groups and providing insightful answers to their questions, you can demonstrate your value and pitch your business.



Publishing Platform – Think of this as a mini blog. If you don’t have a personal website where you host a blog, this can be a space where you build your personal brand and industry credibility. If you do have a personal blog, you can post an excerpt on the Publishing Platform and drive leads back to the full article on your website.



Sales Navigator – LinkedIn’s flagship sales product analyzes the platform’s expansive database to suggest leads that fit specific criteria you select, including industry, job title, and geographic location. This is a paid feature with different plan options, starting at \$99 per month.

Email

SENDING FREQUENCY

Minimum once per month/
maximum once per week.

WHEN SENDING EMAILS, IT'S THE DETAILS THAT MATTER

While best practices are critical for all marketing initiatives, they can make or break an email. Below are some of the most important email best practices to keep in mind:

- **Subject lines** – This is the key to email—you could write the best email of your life, but it won't matter if no one opens it. The best subject lines:
 - Use numbers
 - Are short, between 4–6 words or 40 characters
 - Are personalized—if you can't include the recipient's name, include "you" or "your"
 - Create a sense of urgency (mention deadlines) or curiosity (ask a question)
 - Lead with a verb (e.g., "Save more today with a new plan" rather than "This new plan can help you save more")



[An online subject line tester](#) can help you improve the effectiveness of your subject line before it sends.

- **Length** – Shorter is better. Emails should typically have only 50–125 words.
- **Call to action** – Every email should direct the recipient to an action, whether that's to visit your website, contact you, or something else. This call to action should also be placed "above the fold," meaning the recipient will see it before they have to scroll.
- **Mobile optimization** – More and more clients are working from their phones, so it's important to ensure that when they receive your email, it looks how you intended. [Here are some good tips to follow](#), and you can always send yourself the email as a test.
- **Segmentation** – Not all of your clients have the same retirement needs. Segmenting your email lists, or sending your email to only a certain group of clients that your product, service, or message most affects, can increase the chances they'll take action. Try segmenting your audience according to:
 - **Business size:** A certain product may work better for employers with less than 5 employees than employers with 20–25 employees.
 - **Product:** If there is an improvement or add-on to a certain offering, it makes sense to only communicate that to your clients currently using that offering.
 - **Location:** If there is a conference occurring in a certain state, alert just the clients who live nearby.
 - **Demographics:** Older business owners might be more interested in solutions that help them save as much as possible for retirement, whereas younger business owners might be more interested in solutions that help attract employees.

Email marketing delivers
an average return of

\$44

for every \$1 spent.*



Email (continued)

THINK BEYOND THE SALE

What types of content work for an email? You're probably used to sending sales related emails, like outreach to potential clients or new product emails to existing clients. While these are necessary, some additional, non-sales focused content can help build your authenticity and solidify your personal brand.



New customer welcome email

When you sign a new client, reach out right away with a general thank you and more personal information about yourself.



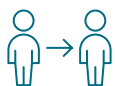
Client appreciation email

You can take this one step further by mailing your most loyal customers on their anniversary dates (1 year, 5 years) to thank them for their continued business.



Holiday eCard

Sending a personalized holiday message can demonstrate an extra level of consideration for your clients' well-being.



Referral thank you

Following up with a personalized thank-you message to someone who referred you can be a great way to strengthen the relationship with this valuable resource.



Departing client touchpoint

Even though we hope this doesn't happen, clients do leave. And when they do, reaching out to them to thank them for their business and to encourage them to reach out if they have any future questions or needs shows your professionalism—and might make them reconsider in the long run.

Website

BLOGS ARE AN UNDERUTILIZED MARKETING ASSET

Although blogs might feel like an outdated platform, they are a powerhouse for Search Engine Optimization (SEO). SEO is what makes your website visible in search, and therefore what drives more traffic—and more opportunities to convert prospects into customers.

When getting started, use what already works – Visit your preferred search engine and enter a question that your niche would likely ask. Analyze what appears on the first page of results. These pages are providing content in a way that performs well, so following—but improving on—their layout and use of keywords is a good first step.



There are a variety of [free SEO courses](#) you can take to familiarize yourself with the basics in just a few hours.

Before you write your content, define your keywords – Keywords are what tie your content to what's being searched in a search engine, and therefore should be the focal point of your content. What do you want to be known for? What words speak to your personal brand and your unique value? You'll want to choose keywords that are specific to your niche and what your niche is searching for.



[Learn more about keywords](#) and how you can research the keywords that will be strongest for your business.

Follow basic blog writing guidelines – There are basic do's and don'ts you can follow to help you create an effective blog article:

Don't do this

Add additional "fluff" content to your blog.



Make it an exchange—don't require the reader to give too much (either information or effort) to get their answer.



Write longer content to pack in more keywords.



Include language that is too technical or too casual.



Only include text.



Do this

Answer the question clearly and directly.

Be altruistic—your blog is a place for you to be helpful "for free."

Write just enough content to answer the question in a helpful way. Your article should focus on no more than 1–2 keywords, mentioning each no more than 5 times.

Speak in a language that is true to you while still being professional.

Break up your text with images, bullet points, videos, icons, headlines, and sub-headlines.

POSTING FREQUENCY

2–4 times per week is ideal, but quality is more important than quantity—if that means you can only post once per month, do that.

Businesses that blog get

67%

more sales leads than those that don't.*

*"Businesses that blog get 67% more sales leads." Media Relations Agency. February 22, 2023.
<https://www.linkedin.com/pulse/businesses-blog-get-67-more-sales-leads-media-relations-inc-/>.

Hands-on activations

You can supplement your main marketing tactics (social media, email, and website) with these hands-on activations.

PARTNER WITH PROFESSIONALS IN RELATED FIELDS

- Establish a mutual referral program
- Host an event or webinar together
- Develop co-branded marketing materials

GET INVOLVED IN YOUR COMMUNITY

- Attend a local charity event, donate on behalf of your clients, or host a donation event
- Set up a booth at a farmer's market
- Host client appreciation events (rent out a movie theater, roller rink, or bowling alley)
- Sponsor a youth sport

SEND DIRECT MAIL

- Send out birthday cards or thank-you letters
- Send to contacts who don't open or engage with your emails
- Send out physical invitations to an event you're hosting
- Include QR codes to drive users to your digital marketing platforms (website, social media)



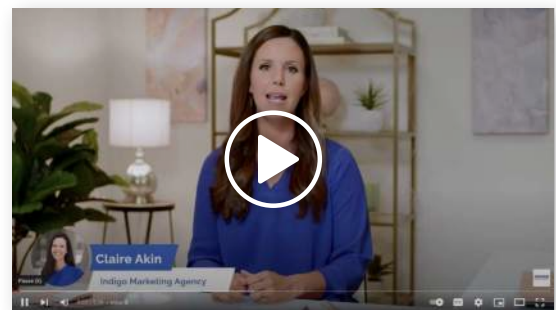
[Forming Strategic Partnerships
as a Financial Advisor](#)





HOST YOUR OWN WEBINAR OR WORKSHOP

- Gather a group of experts in your field and host a virtual panel
- Host your own genius bar (offer tech support; you can directly enter your contact info along with your website and show you're tech-forward)
- Set up a virtual lunch and learn (e.g., general finance for new clients); for in-person events, you can offer a complimentary lunch to anyone who registers



[Top-Performing Webinar Ideas for Financial Advisors](#)

LEVERAGE PUBLIC RELATIONS

- [Get featured in trade magazines and industry publications](#)
- Build credibility by [getting quoted as an expert](#) in news publications
- [Join a podcast](#) to reach a larger audience
- Send press releases to local newspapers and radio stations
 - Respond to upcoming financial/tax legislation changes
 - Contribute to or suggest they start a money advice column where you answer readers' questions

START VIDEO MARKETING

- Check out a [guide to using video in your marketing](#)
- Use different video types: About us, testimonials, case studies, educational series, and recorded webinars

SET UP GOOGLE MY BUSINESS

- Read more about [how to create a Google business profile](#)
- Make sure your business profile is [optimized](#)
- Generate public reviews wherever possible (via email, email signature, on your website, QR code, etc.)

Sample marketing plan calendar

JANUARY 2024

■ Social Media (LinkedIn)
 ■ Blog post
 ■ Email
 ■ Other

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--------|--------------------------------------|--|---|---------------------------------|--|----------|
| 31 | 1 Happy New Year + webinar invite | 2 5 ways to prepare for the year ahead | 3 New Year post: What are your retirement goals? | 4 | 5 Check out my first blog post of the year | 6 |
| 7 | 8 Tie into Golden Globes | 9 Direct mail: Send an invite to anyone who didn't open email | 10 Let's review your yearly retirement plan | 11 | 12 | 13 |
| 14 | 15 MLK Day | 16 Quarterly newsletter | 17 National Hobby Month How to help your employees get the most out of their retirement | 18 | 19 Check out my recent blog post | 20 |
| 21 | 22 | 23 POLL: What are you adding to your company's retirement plan? | 24 | 25 New article from Ascensus | 26 ← (see TIP! below) | 27 |
| 28 | 29 Share a testimonial | 30 Event reminder: Last chance to register | 31 Webinar: Retirement Planning for 2024 | 1 | 2 Missed webinar? Recording available on my website | 3 |

TIP!

Don't know what to write? You can use our resources as inspiration for blog articles and social posts, or link to our articles for more information.



- [Retirement Saving Resources](#)
- [Advisor Toolkit](#)
- [Plan Sponsor Education](#)
- [News and Education](#)
- [Savings Trends](#)
- [SECURE 2.0](#)

Takeaways

- Building an authentic personal brand is an effective, long-term way to distinguish yourself.
- Your personal brand is at its most powerful when marketed in a way that achieves your SMART goals.
- Remember, marketing is holistic—it encompasses every detail that impacts the chances of someone doing business with you—so it's important your personal brand shines through in everything you do.



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Visit our [News and Education](#) page to get started on your marketing plan today.

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