



DBA Marketing Launch Strategy

Welcome to the GVA family! GVA Marketing is excited to support you through your transition to independence. We invite you to see a summary of the marketing recommendations and offerings available to you below. Note, nothing is mandatory or required, so you have the freedom to choose what is right for you and your practice.

We realize this may seem daunting at first, so let's start by kicking off with a free 1-hour consultation – contact Stef Dolan (sdolan@greatvalleyadvisors) to schedule today!

DBA NAME AND BRANDING

Schedule 1-hour consult with GVA Marketing to discuss direction for DBA name, branding, colors, and logo. The goal is to create a consistent look and feel and messaging:

- i. Brainstorm on your own prior to the meeting: what are your likes/dislikes, do you have hobbies, what colors do you like/dislike?

Once DBA name is determined then GVA:

- i. Checks with the appropriate Secretary of State website for availability.
- ii. Checks to ensure possible domain names are available.

Design brand logo – you may complete on your own, or GVA Marketing can provide option(s)*:

- i. After you decide on a DBA logo have your creative team provide multiple high-res versions, including full-color, black & white, elongated (with full DBA name spelled out) and condensed (logo only) versions.

Advisor to submit DBA name and logo to Compliance for approval**:

- i. Note: if multiple DBAs will be used, then register the additional names with LPL as OBAs.

Advisor to file registration materials according to your state's guidelines.

DOMAIN NAME AND WEBSITE BUILD-OUT

Once DBA name is confirmed, GVA and advisor will determine domain name; GVA will purchase on your behalf initially through a domain registrar (i.e. GoDaddy.com); however the website will be registered to you and the annual domain renewal may be your responsibility. (Domain registration typically costs under \$20 per year)*.

* Additional fees may apply. | **Compliance Submissions: **GVA Hybrid:** LPL MRR via ComplianceMax, **GVA RIA only:** compliance@greatvalleyadvisors.com

Advisor to work with a website developer on look and feel and to populate site content:

- i. GVA recommends working with our preferred partner, Advstry; however you may choose to use whoever you'd like.* Advstry has built dozens of advisor websites and is very familiar with GVA and our process.
- ii. By working with Advstry, the advisor's website will have the GVA Economic and Market reports, blog posts, and other content posted on their site weekly.
- iii. Additionally, GVA subsidizes the cost of the buildout through Advstry.

GVA's preferred partner (Advstry) provides hosting for the website domain and adds an SSL certificate so that your URL shows as secure (padlock icon and https://) to your visitors*:

- i. Advisor can also purchase hosting and SSL through a provider themselves if they would like to.

Submit to Compliance for approval:**

- i. Ideally your site should go live the same day as your official transition so that clients or other members of your network can find information on your new office.

PRINT COLLATERAL

Simultaneous to your website build-out, you should develop your print collateral pieces. This may include business cards, letterhead, brochures, business cards, stationary, notepads, folders banners, and more.

- i. You are not required to develop print pieces; however we recommend doing so do the success of your practice. GVA Marketing can work with you to provide proofs and pricing for each desired piece.*
- ii. GVA recommends our preferred partner, ANRO Printing; however you may choose to use whoever you'd like.*

Submit to Compliance for approval.**

OFFICE SIGNAGE

Advisor to work with your preferred local sign vendor to coordinate the design, production, and installation of interior and exterior signage.

- i. Check the Compliant Office Reference Guide in the Office Set Up folder of the GVA Early Access Portal.

Remember, before purchasing please submit final designs to Compliance for approval.**

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PRINT COLLATERAL

Establish a LinkedIn company page for your new DBA:

- i. Ensure all information is accurate and complete, and your new DBA logo is prominently featured.

Our partner, Advstry, can also provide setup and management of social media services if the Advisor prefers.

Update your own, personal LinkedIn profile; and encourage your DBA team members to do the same:

- i. Update your current employer to display your newly established DBA and make your title appropriate.
- ii. Ensure your headshot is up-to-date, and if not invest in a new headshot.
- iii. Update your LinkedIn cover banner, ideally utilizing your newly approved logo and imagery to compliment your DBA's branding.
- iv. Additionally, if you utilize additional social media platforms (i.e. Facebook, X (formerly Twitter), YouTube, etc.), for professional use then please complete the above steps for all.

Connect with your existing clients on your social media platforms so that you have a direct communication channel after registrations change; also, social media serves as another opportunity to publicize your transition and the positive outcomes for clients it provides.

Signup for LPL Social Patrol

- i. Hybrids: after signing up for LPL Social Patrol (LPL required compliance supervision), then complete LPL Social Media training.
- ii. RIA-Only will be added to GVA's Smarsh account.

"Follow" GVA's Facebook, X (formerly Twitter), LinkedIn, and YouTube accounts.

- i. Doing so will keep you informed, widen your network, and provide you with ideas on what to post. Additionally, we encourage you to re-post GVA content that may be useful to your client-base (i.e. blog posts, market insights, videos, etc).

PRESS COVERAGE AND ANNOUNCEMENTS

LinkedIn – send a headshot and bio to GVA Marketing so that we may announce you joining the GVA family from the rooftops!

- i. After GVA posts, and licenses transfer, we encourage you to re-post the announcement to your LinkedIn account—be sure to add your own personal note!

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Press Release – develop a 2-3 paragraph summary of your transition and coordinate the distribution by submitting to various outlets, i.e. local, daily, and weekly newspapers, organizations you belong to, alumni magazine, etc. Here are some ideas of information to include:

- i. How long you have been in the financial advising business, when you established your independent practice, and other community boards, activities, etc. in which you are involved.
- ii. We also recommend you post the press release to your own website, and then post to your social media accounts.

Reminder to please submit the press release to LPL Compliance for approval before posting or distributing.**

NEWSLETTER

We recommend regular contact and interaction with your clients, and an easy way to do so is through is posting to your website's blog and linking to the content through an automated newsletter.

- i. Create a newsletter template with header and footer disclosures.
- ii. For content you may choose to develop yourself, employ a 3rd party content creator, and/or utilize materials developed by GVA (i.e. weekly Market Insight document, bi-monthly Market Insight video). Obtain compliance approval before distribution.**

ONGOING MARKETING PLAN

While there is no formal requirement for a marketing plan, some marketing processes to consider as you continue growing your independent wealth management practice are:

- i. Identifying Niche Markets
- ii. Strategic Partnering
- iii. Asking for Referrals
- iv. Consistent communication through an active social media presence, and email marketing.

Additionally, if you have a piece you think would benefit the entire GVA community via “The Gatekeeper”, submit here: communications@greatvalleyadvisors.com

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