

Ongoing Marketing Solutions for Financial Advisors

Take Control of Your Firm's Future

For over 20 years, Align Marketing Group (AMG) has provided outsourced marketing services to scores of firms in the financial services industries in Minnesota and beyond. The decision to hire AMG as your firm's outsourced marketing department enables you to focus on what you do best while still keeping business growth and new client development a priority. With AMG on board, you have the benefit of a fully staffed, highly experienced marketing department, while paying a fraction of the cost of hiring an in-house marketing department. We are a big-picture, clear-thinking, practical marketing agency that will partner with you to create and implement a comprehensive marketing strategy sourced from your strengths, aligned with your time, ability, and resources, and aimed directly at your prosperous, sustainable future.

Leading the Charge

AMG partner, Kristy L. Gusick, has been working within and for financial service firms since 1994. The length and depth of her experience within the financial services industry has shown her first-hand what it takes for an advisory practice to attain and retain clients within a very competitive marketplace. She also has a deep knowledge on what it takes to successfully implement marketing initiatives while adhering to complex compliance department requirements. Kristy and her team of AMG marketing professionals have everything it takes to ensure your firm's marketing efforts succeed.

STEP 1 Custom Marketing Plan Development

Custom Marketing Plan →

- Develop criteria for A-level clients
- Identify your unique selling points
- Determine your target audiences
- Outline your marketing strategy
- Set your goals for the year
- Take step-by-step action

We will develop a unique and customized marketing plan designed to expand relationships with current clients, drive new revenue into the firm, increase the firm's name recognition, and effectively communicate with contacts. Our strategic marketing plan process includes focusing on your business growth objectives, target audiences, key messages, revenue summary and goals, AND developing a tactical implementation calendar utilizing our trade-marked Four Pillars of Marketing™. Our plans are clear, concise and include detailed roadmaps designed to provide focus and accountability during implementation.

STEP 2 Monthly Marketing Implementation

Monthly Marketing Implementation

COST: \$2,500-\$9,000/MONTH depending on firm size, goals and budget

We utilize the AMG “[Dream Team](#)” of marketing experts to create your outsourced marketing department. Whether the plan calls for graphic design, copywriting, website design, social media, public relations, branding, advertising, surveys, referral source development, or anything else, we lead the charge so you can focus on delivering services to your clients. We plan and facilitate monthly marketing meetings at your firm and develop, agendas, meeting summaries, and an implementation calendar.

Your outsourced marketing department will include a marketing director and a host of hand-picked marketing specialists from the stellar AMG Team. We organize our implementation strategies around The Four Pillars of Marketing™ and will likely pursue strategies in each of the following areas: Retaining and Growing Existing Relationships, Attracting New Clients, Increasing Name Recognition and Awareness, and Creating Targeted and Effective Communications. See below for more information.

[View a list of possible on-going marketing initiatives >](#)

**Pricing for monthly marketing retainers vary per client based on the size of your firm, budget, and goals.*

Explore Our Client Examples



JAK + Co.

CPA FIRM

- Strong website biographies
- Job application functionality
- Strong blogging platform
- On-site SEO
- 90 Year Retrospective
- Niche service areas

[VISIT SITE](#)



Castle Rock

FINANCIAL PLANNING

- Social media management
- Graphic design
- Print materials
- Regular blogging
- New branding

[VISIT SITE](#)



Ousky Law Office

LAW FIRM

- Consultation Room
- Videography
- Extensive resources, including blogs, articles, books, and videos Unique feedback page

[VISIT SITE](#)

Align Marketing Group

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