

The Advisors Forum

A WEALTHCOUNSEL COMPANY

Our Business is Helping You Grow Your Business



PROVEN MARKETING SOLUTIONS TO GROW YOUR PRACTICE

The Advisors Forum provides a turnkey system for attorneys to generate consistent new business from other wealth planning professionals. This proven system empowers Forum members to provide more comprehensive planning for existing and prospective clients, creating measurable success for all parties.

STRENGTHEN REFERRAL NETWORKS

Easily market your services to professional referral sources with branded personalized monthly newsletters, teleconferences, turnkey CE presenter packages, blogging content and other tools that have proven to generate consistent new business.

DEVELOP NICHE MARKETS

Access marketing materials, presentations and other materials from the Advisors Forum Knowledge Base and participate in webinars to learn niche marketing techniques that will set you apart as the leading authority in your local market.

ENGAGE CLIENTS FASTER

Stay top-of-mind with clients and prospects with minimal effort by sending them branded personalized quarterly newsletters. Use the Advisors Forum Planner software to more easily gain client buy-in on your estate planning recommendations.

SUPERCHARGE YOUR MARKETING

Automation is the key to generating new business with less effort! Attract more clients through your website with our Content Management System, a package of electronic marketing solutions that integrates with your existing website.

(Note: Requires additional fee and web hosting.)

To preview these proven marketing solutions, contact us at 888-659-4069, ext. 819. Or visit www.advisorsforum.com

PLATFORM MEMBERSHIP

The perfect membership for attorneys who prefer a “more traditional” content-based marketing solution.

- **The Wealth Counselor** – Automated monthly newsletter sent to your professional advisors
- **The Wealth Advisor** – Automated quarterly newsletters sent to your current and prospective clients
- **CPE Series for CPAs and Interdisciplinary Webinars** – Monthly discussion of client strategies that facilitates networking with advisors; continuing education credit available for attendees
- **Advisors Forum Listserv** – Electronic forum to collaborate daily with experienced colleagues
- **Advisors Forum Knowledge Base** – Access to marketing materials, presentations, planning materials and more
- **Member Directory Listing** – Online exposure that promotes client generation

Discount Pricing for Members of WealthCounsel and ElderCounsel

| Initiation Fee | Monthly Fee |
|----------------|-------------|
|----------------|-------------|

Contact us at 888-659-4069, ext. 819 for pricing

Pricing for Non-Members of WealthCounsel and ElderCounsel

| Initiation Fee | Monthly Fee |
|----------------|-------------|
|----------------|-------------|

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WEB-CENTRIC MEMBERSHIP

The ultimate membership for busy attorneys who prefer a “branded” and robust content marketing solution.

- **The Wealth Counselor** – Automated monthly newsletter with your branding sent to professional advisors
- **The Wealth Advisor** – Automated quarterly newsletter with your branding sent to your current/prospective clients
- **CPE Series for CPAs and Interdisciplinary Webinars** – Monthly discussion of client strategies that facilitates networking with advisors; continuing education credit available for attendees
- **Blogging Content** – Readily available content on a variety of topics that you don’t have to spend hours creating
- **Presenter Seminar Packages** – Turnkey content study groups with continuing education credits
- **Advisors Forum Planner** – Software template that empowers users to have fact-based client discussions
- **Advisors Forum Listserv** – Electronic forum to collaborate daily with experienced colleagues
- **Advisors Forum Knowledge Base** – Access to Platform Membership content, PLUS 100+ archived events
- **Member Directory Listing** – Online exposure that promotes client generation

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