



# 01

## Growing Businesses

Wealth Design Marketing works with corporate clients and professional services firms. Whether to create their marketing strategy, deliver training or a strategic planning review service we are invested in the success of our clients. Our marketing approach identifies quick wins to grow the business and marketing materials are developed to support this growth.

“Your skill in understanding what our bigger aims are, are translated into an extremely powerful marketing strategy. This will certainly help promote our offering.”

“I’m loving this, and the appearance is in line with our thoughts!”



# 02

## Financial Adviser Marketing

Wealth Design Marketing works on an ongoing or project basis. We have developed and analysed client questionnaires, created and managed ongoing client communications and run niche marketing campaigns. Whether you want to improve consistency, raise your profile or increase incoming business our understanding of the financial advisory lifecycle means we can work with your firm to add value.

“I’m so pleased with how it’s all going. I’m just grateful that you’re working with us and appreciate your expertise.”

“We were really impressed with you and your infectious enthusiasm!”



# 03

## Increasing Engagement with DFMs

We create and deliver highly engaging, informative and fun sessions for financial advisory firms and your professional connections. Topics include a generational planning approach, attracting women with wealth, niche marketing and future proofing your business. We can create a session to fit a specific theme.

“I really enjoyed your workshop. It was fun and absolutely packed with information. I took away with me many new ideas for the future that I certainly intend using.”

“Absolutely brilliant session, they all loved it and really thought provoking.”