Lead-Lag Media®

34 COMPLIMENTARY SERVICES

# Built for your practice. Requested by email.

What each service includes, what we will ask you, and what you get back. To request one, reply to the email this came with and send the number.

**No login. No forms. Complimentary.**

HOW IT WORKS

# Four steps, all by email

1

## Reply

Send the number of a service, or just describe what you are working on.

2

## A few questions

We ask only what we do not already know about you and your practice. Usually one short email.

3

## We build it

The work is tailored to your practice, your clients and your market, then checked for accuracy and quality.

4

## Review and use

You get a PDF and an editable Word file in the same thread. Ask for changes anytime.

Drafts are for your review and your firm's compliance review before use. No results are guaranteed. Services that need a live step, such as introductions, webinars or a website launch, are planned with you by email and coordinated by our team.

# Services by goal (1 of 2)

## Win new clients

27 Cold Email Campaign

22 Money-in-Motion Prospect Strategy Pack

30 PlanPoacher (Form 5500 401(k) Prospecting)

5 Prospect Call Prep Brief

29 LinkedIn Outreach Automation

25 Programmatic Ad Management

## Grow through referrals and peers

12 Referral Partner Outreach Kit

1 Advisor-to-Advisor Introductions

3 Monthly Group Meetings

20 Advisor Dinner Planner

## Build a visible brand

18 Personal Brand Positioning

10 LinkedIn Profile Optimization

32 Social Media Management (X, LinkedIn)

34 Website Development & Design

26 SEO

28 GEO (Generative Engine Optimization)

19 Video Editing

31 Podcast Bookings & Media Outreach

# Services by goal (2 of 2)

## Publish market commentary

15 White-Labeled Market Commentary

7 Branded Market Commentary Graphics

13 Sourced Market Thread Kit

17 Newsletter Design & Formatting

21 Email Marketing Support

## Run webinars

23 Webinar Planning Studio

24 Webinar Promotion

14 Webinar-to-Follow-Up Kit

33 CE Credit Webinar Hosting

## Onboard and serve clients

11 New Client Onboarding Kit

9 Client Service Calendar

2 Client Question Reply Kit

6 Annual Client Review Kit

4 Post-Meeting Follow-Up Pack

## Educate clients

8 Client Education One-Pager

16 Monthly Financial Planning Content Kit

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# Cold Email Campaign

## A complete outbound campaign, built for you

Strategy, targeting, compliance-aware copy and deliverability setup for a cold email campaign grounded in your actual offering. You get a ready-to-review sequence, not a blank page.

### WHAT YOU GET

- Campaign strategy
- ICP and suppression checklist
- Sender and domain readiness checklist
- Deliverability setup checklist
- 3-4 email sequence

### WHAT WE MAY ASK YOU

- Campaign objective
- Target audience / ICP
- Audience source and list status
- Sender identity

**Example request:** "Write a cold email sequence to physicians in my state."

Good to know: Heavy paid list purchases and data enrichment costs are not included.

**Reply with** **27**

**Timing**
7-10 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors who want first conversations with qualified prospects

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# Money-in-Motion Prospect Strategy Pack

## Reach people at the moment their finances change

A prospect strategy for business sales, inheritances, retirements, relocations and other money-in-motion events: signal sourcing, sourced fit analysis and outreach copy, without assuming need, timing or assets.

### WHAT YOU GET

- Signal sourcing status
- Named prospect discovery shortlist
- Prospect/advisor research brief
- Alignment rationale
- Risk and sensitivity notes

### WHAT WE MAY ASK YOU

- Workflow stage
- Target advisor client type
- Preferred money-in-motion signals
- Signals to avoid

Reply with **22**

**Timing**
3-5 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors who want a focused plan for high-opportunity prospects

**Example request:** "Find business owners in my area who may be preparing to sell."

Good to know: Does not send live outreach, guarantee prospect fit, infer assets, or contact prospects. Public signal research runs only when permission and research targets are supplied; otherwise this is a strategy pack from saved inputs.

# PlanPoacher (Form 5500 401(k) Prospecting)

## Find the 401(k) plans worth a conversation

A prospecting dataset and report built on Form 5500 signals, with qualification criteria and a sponsor outreach angle for your geography.

### WHAT YOU GET

- Plan search brief
- Qualification criteria
- Form 5500 evidence field map
- Exclusion and suppression rules
- Sponsor prioritization logic

### WHAT WE MAY ASK YOU

- Target geography / radius
- Plan size range
- Target plan type
- Ideal sponsor profile

**Example request:** "Find 401(k) plans within 30 miles that may be ready for a new advisor."

Good to know: Ongoing dataset refreshes are scoped separately.

**Reply with** **30**

**Timing**
5-8 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors building a retirement plan or business-owner practice

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# Prospect Call Prep Brief

## Walk into the next conversation with a plan

Give us the context and your desired outcome. Get likely planning themes, questions to ask, positioning notes and a soft next step, in about one to two business days.

### WHAT YOU GET

- Prospect context summary
- Likely planning themes
- Questions to ask
- Advisor positioning notes
- Soft CTA options

### WHAT WE MAY ASK YOU

- Prospect type
- Known prospect context
- Source links / evidence available
- Advisor positioning / planning focus

**Reply with** **5**

**Timing**
1-2 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors preparing for a prospect, referral partner or new-client call

**Example request:** "I have a first call Thursday with a couple nearing retirement. Can you prep me?"

Good to know: Does not infer private facts, financial need, assets, readiness, or intent beyond supplied context.

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# LinkedIn Outreach Automation

## Relationship-first LinkedIn outreach, set up properly

Strategy, targeting, a connection note and follow-up sequence, and account and tooling readiness for compliance-aware LinkedIn outreach. You and your firm review and run it from your own account.

### WHAT YOU GET

- LinkedIn outreach strategy
- ICP and suppression checklist
- Profile and account readiness checklist
- Automation/tooling readiness checklist
- Connection note options

### WHAT WE MAY ASK YOU

- Outreach objective
- Target audience / ICP
- Audience source and list status
- LinkedIn profile URL and account status

**Example request:** "Set up relationship-first LinkedIn outreach to small business owners."

Good to know: Third-party automation tool subscriptions are advisor-paid where required.

Reply with **29**

**Timing**
Setup 7-10 business days, then ongoing

**How it is delivered**
Planned with you by email, then coordinated by our team

**Best for**
Advisors who want a steady stream of LinkedIn conversations

Lead-Lag Media®

# Programmatic Ad Management

## Paid campaigns set up and managed, spend under your control

Setup and management of programmatic ad campaigns, with audience targeting, exclusions and landing-page alignment. You pay ad spend directly to the ad platforms.

### WHAT YOU GET

- Paid media setup brief
- Platform/access readiness checklist
- Budget and billing boundary note
- Audience targeting plan
- Exclusion/suppression plan

### WHAT WE MAY ASK YOU

- Campaign objective
- Ad platform(s)
- Ad account access/status
- Budget and billing setup

**Example request:** "Set up a small ad campaign aimed at local business owners. I'll set the budget."

Good to know: Ad spend is advisor-paid directly to the ad platforms and is not included.

**Reply with** **25**

**Timing**
Setup 5-7 business days, then managed

**How it is delivered**
Planned with you by email, then coordinated by our team

**Best for**
Advisors ready to add paid media to their growth plan

# Referral Partner Outreach Kit

## Better conversations with CPAs, attorneys and other centers of influence

Positioning, a value exchange, intro and follow-up copy and talking points for the professional partners who can send you clients.

### WHAT YOU GET

- Referral partner positioning
- Intro outreach email
- Follow-up sequence
- Talking points
- LinkedIn or short-message copy

### WHAT WE MAY ASK YOU

- Referral partner type
- Referral partner relationship stage
- Target client segment
- Advisor positioning / planning focus

**Example request:** "Help me start conversations with CPAs in my town."

Good to know: Does not imply an endorsement, referral arrangement, solicitor agreement, or client outcome.

**Reply with** **12**

**Timing**
2-3 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors building a referral network

# Advisor-to-Advisor Introductions

## Warm introductions across the Lead-Lag Media network

A facilitated, mutual opt-in introduction to another advisor in the network, with match reasoning and a suggested opening message once both sides agree.

### WHAT YOU GET

- Request summary
- Match criteria used
- Recommended matches when confidence is high
- Why each match fits
- Mutual opt-in next step

### WHAT WE MAY ASK YOU

- Introduction objective
- Your niche / specialty
- Client segments you serve
- Ideal advisor peer profile

**Example request:** "Number 1. I'd like to meet an advisor who works with physicians in the Midwest."

**Reply with** **1**

**Timing**
As matches arise

**How it is delivered**
Planned with you by email, then coordinated by our team

**Best for**
Advisors who want peers to trade ideas, referrals and best practices with

# Monthly Group Meetings

## A seat at the table every month

Access to the monthly advisor group meetings: shared learning, peer insight and community, with a prep brief and discussion questions to get more out of each session.

### WHAT YOU GET

- Access and participation summary
- Meeting-prep brief
- Suggested discussion questions
- Contribution idea
- Peer-fit notes

### WHAT WE MAY ASK YOU

- Attendance goal
- Preferred attendance cadence
- Topics of interest
- Ideal peer group

**Example request:** "Save me a seat at the next group meeting. I'd like to talk about client acquisition."

**Reply with** **3**

**Timing**
Recurring monthly access

**How it is delivered**
Planned with you by email, then coordinated by our team

**Best for**
Advisors who want a consistent peer community

Lead-Lag Media®

# Advisor Dinner Planner

## Plan a dinner that fills seats with the right guests

A complete pack for one in-person advisor dinner: concept, venue plan, guest strategy and invitations, sponsor options, run of show, budget planner and follow-up.

### WHAT YOU GET

- Dinner concept and theme
- Venue plan
- Guest-list strategy and invitation copy
- Sponsor alignment
- Run of show

### WHAT WE MAY ASK YOU

- City / market
- Guest profile
- Dinner objective
- Date window

**Reply with** **20**

**Timing**
2-3 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors hosting a client or prospect dinner in their market

**Example request:** "Plan a dinner for 10 business-owner prospects in Charlotte in the spring."

Good to know: Does not book venues, send invitations, or confirm pricing. Venue capacity and cost figures are estimates the advisor confirms directly with the venue.

Lead-Lag Media®

# Personal Brand Positioning

## Say who you are, clearly and consistently

Your niche, differentiators, bios, proof points, call-to-action language and voice rules in one messaging foundation you can reuse everywhere.

### WHAT YOU GET

- Positioning statement
- Differentiation statement
- Ideal client profile
- Messaging pillars
- Proof-point map

### WHAT WE MAY ASK YOU

- Brand objective
- Target client segment
- Primary niche / specialization
- Geography / market served

**Example request:** "I serve tech employees with stock comp. Help me say that clearly."

**Reply with** **18**

**Timing**
5-7 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors whose message is not yet sharp

Lead-Lag Media®

# LinkedIn Profile Optimization

## A profile that reads like a practice, not a résumé

A one-time rewrite of your headline, About section, featured section, experience entries and call to action, tuned for how prospects evaluate an advisor.

### WHAT YOU GET

- Optimized headline
- About section rewrite
- Creator/service positioning line
- Credibility bullets
- Experience section rewrite

### WHAT WE MAY ASK YOU

- Current LinkedIn URL
- Target client segment
- Primary niche / specialization
- Geography / market served

**Example request:** "Here's my LinkedIn. Make it read like my practice, not my resume."

**Reply with** **10**

**Timing**
3-5 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors whose LinkedIn profile is their first impression

Lead-Lag Media®

# Social Media Management (X, LinkedIn)

## An always-on presence on X and LinkedIn

A content calendar, on-brand posts and ongoing management for X and LinkedIn. Setup covers strategy and channel buildout, and the monthly service keeps your feeds active.

### WHAT YOU GET

- 30-day content calendar
- Weekly content pillars and rationale
- Platform-specific post batch for LinkedIn and X
- Per-post objective, audience, CTA, and compliance notes
- Character counts for X posts

### WHAT WE MAY ASK YOU

- Social objective
- Target audience
- Channels and handles
- Posting cadence

**Example request:** "Keep my LinkedIn active with two posts a week."

Good to know: Paid social ad spend is advisor-paid and not included.

**Reply with** **32**

**Timing**
Setup 7-10 business days, then ongoing

**How it is delivered**
Planned with you by email, then coordinated by our team

**Best for**
Advisors who want to be visible without writing every post

Lead-Lag Media®

# Website Development & Design

## A full website that reflects your practice

Strategy, sitemap, copy framework, visual direction, technical requirements and launch planning for a full site.

### WHAT YOU GET

- Website scope brief
- Sitemap and page plan
- Page hierarchy and CTA map
- Homepage copy framework
- Interior page content plan

### WHAT WE MAY ASK YOU

- Website objective
- Website type / scope
- Target audience
- Primary conversion goal

**Example request:** "My website is outdated. Help me rebuild it."

Good to know: Domain, hosting, and premium third-party plugins/themes are advisor-paid.

**Reply with** **34**

**Timing**
Scoped per engagement

**How it is delivered**
Planned with you by email, then coordinated by our team

**Best for**
Advisors with an outdated site or none at all

Lead-Lag Media®

# SEO

## Get found when prospects search

An audit of your site and an implementation plan: keyword and topic map, page-by-page changes and technical and local SEO checklists.

### WHAT YOU GET

- SEO audit scope brief
- Current-state audit with data caveats
- Search intent map
- Priority keyword/topic map
- Page-by-page optimization plan

### WHAT WE MAY ASK YOU

- Website URL
- SEO objective
- Target audience / market
- Target geography

**Example request:** "Here's my website. Why don't I show up when people search for advisors in my town?"

Good to know: Indefinite ongoing SEO management is not included.

**Reply with** **26**

**Timing**
7-10 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors who want more inbound traffic from search

Lead-Lag Media®

# GEO (Generative Engine Optimization)

## Show up when prospects ask an AI

An audit of how generative engines describe you today, plus profile, schema and content recommendations to improve how you are surfaced.

### WHAT YOU GET

- Entity visibility baseline
- Prompt test plan
- Correct-answer target
- Entity consistency audit
- Schema and technical recommendations

### WHAT WE MAY ASK YOU

- Advisor / firm entity name
- Primary niches / markets
- Target geography
- Ideal prospect questions

**Example request:** "What does ChatGPT say when someone asks for an advisor like me?"

**Reply with** **28**

**Timing**
7-10 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors who want to stay discoverable as search moves to AI

Lead-Lag Media®

# Video Editing

## One recording, many clips

Professional editing of one webinar or interview, repurposed into short channel-ready clips with captions and export guidance.

### WHAT YOU GET

- Editing summary
- Recommended clip package
- Draft captions for each clip
- Channel export table
- Brand and style recommendations

### WHAT WE MAY ASK YOU

- Source recording link or file
- Video type
- Editing objective
- Target audience

**Example request:** "Here's a 20-minute recording. Cut it into short clips for LinkedIn."

Good to know: Original filming/production is not included.

**Reply with** **19**

**Timing**
5-7 business days

**How it is delivered**
Planned with you by email, then coordinated by our team

**Best for**
Advisors with a recording they want to reuse

Lead-Lag Media®

# Podcast Bookings & Media Outreach

## A campaign built to get you heard

Positioning, named target outlets, pitch angles, booking emails and a follow-up sequence, so you can pitch podcasts and media with a plan. Bookings are not guaranteed.

### WHAT YOU GET

- Media outreach strategy
- Your media positioning
- Target outlet profile
- Named target package
- Pitch angle set

### WHAT WE MAY ASK YOU

- Media objective
- Target audience / listener profile
- Your expertise / topics
- Unique point of view / contrarian angle

**Reply with** **31**

**Timing**
Coordinated over campaign window

**How it is delivered**
Planned with you by email, then coordinated by our team

**Best for**
Advisors who want earned media exposure

**Example request:** "Get me booked on podcasts about retirement planning."

Good to know: This does not guarantee bookings, secure placements, send pitches, or pay for sponsored media. You and your firm must verify host, producer, and outlet contact paths from public professional sources before use.

Lead-Lag Media®

# White-Labeled Market Commentary

## Polished commentary in your voice, ready to publish

A white-labeled market commentary tuned to your clients, with a client email version, LinkedIn version, social pull quotes and dated source notes.

### WHAT YOU GET

- Full commentary draft with disclosure language
- Short client email version
- LinkedIn version
- Social pull quotes
- Source notes with dates

### WHAT WE MAY ASK YOU

- Commentary objective
- Target audience
- Market theme or client question
- Source material or research preference

**Example request:** "Monthly market commentary in my voice for my client newsletter."

Good to know: Ongoing monthly cadence beyond the starter pack is scoped separately.

**Reply with** **15**

**Timing**
3-5 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors who want to publish market perspective consistently

Lead-Lag Media®

# Branded Market Commentary Graphics

## Charts and graphics that match your brand

A batch of five to six branded graphic briefs with chart recommendations, on-graphic copy, captions and alt text, ready for a designer or your own tools.

### WHAT YOU GET

- Asset map for 5-6 graphics
- Per-asset brief with objective, audience, format, aspect ratio, and channel
- On-graphic copy blocks
- Social captions per asset
- Alt text per asset

### WHAT WE MAY ASK YOU

- Graphics objective
- Target audience
- Brand assets and style guide
- Source commentary or core message

**Example request:** "Graphics on this month's rate move that match my firm's colors."

**Reply with** **7**

**Timing**
3-5 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors who want commentary that looks as good as it reads

Lead-Lag Media®

# Sourced Market Thread Kit

## Sourced market threads, ready to reuse across channels

A sourced primary X thread in your voice, with alternate hooks, LinkedIn versions, a short email teaser and source notes.

### WHAT YOU GET

- Primary thread
- Alternate hooks
- LinkedIn-adapted posts
- Short email/newsletter teaser
- Source notes

### WHAT WE MAY ASK YOU

- Core market thesis or question
- Target audience
- Source material or research request
- Market data / chart request (optional)

**Example request:** "A sourced thread on what the latest jobs report means for bonds."

**Reply with** **13**

**Timing**
3-5 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors who want credible, shareable market content

Lead-Lag Media®

# Newsletter Design & Formatting

## A newsletter template you can reuse, plus your first issue

A reusable template designed to your brand, a review-ready first issue and a send-readiness checklist.

### WHAT YOU GET

- Reusable newsletter template structure
- First-issue layout plan
- Section-by-section content blocks
- Subject line and preview text options
- CTA block

### WHAT WE MAY ASK YOU

- Newsletter objective
- Target audience
- Newsletter platform
- Brand assets and style guide

**Example request:** "Design a monthly newsletter template and help me with the first issue."

Good to know: Ongoing per-issue formatting is scoped separately.

**Reply with** **17**

**Timing**
5-7 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors starting or upgrading a client newsletter

# Email Marketing Support

## Strategy, template and campaign setup in one package

An email program strategy, segmentation plan, reusable template and copy for your campaigns, with a sender and compliance checklist.

### WHAT YOU GET

- Email program strategy
- Audience and segmentation plan
- Sender and compliance setup checklist
- Reusable email template structure
- Subject line and preview text options

### WHAT WE MAY ASK YOU

- Email objective
- Target audience / list segments
- Email platform and access status
- Sender identity and reply handling

**Example request:** "Set up a welcome sequence for new newsletter subscribers."

Good to know: Email platform subscription fees are advisor-paid.

**Reply with** **21**

**Timing**
5-7 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors who want a real email program

# Webinar Planning Studio

## Take a webinar from idea to production plan

Scored topic options, an expert alignment plan, format and platform plan, registration copy, run of show, a three-week promotion timeline and a follow-up plan.

### WHAT YOU GET

- Topic and angle selection with scoring
- Expert alignment plan
- Format and platform plan
- Registration page copy
- Run of show

### WHAT WE MAY ASK YOU

- Target audience
- Webinar objective
- Date window
- Solo or guest format

**Reply with** **23**

**Timing**
2-3 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors planning their first or next webinar

**Example request:** "Plan a webinar for pre-retirees on income planning."

Good to know: Does not book experts, schedule the webinar, or send promotion. Expert credentials must be verified before public billing. Pair with Webinar Promotion and the Webinar-to-Follow-Up Kit for execution assets.

# Webinar Promotion

## Fill the room across your own channels

An email sequence, LinkedIn and X posts, a newsletter blurb, landing page copy and a reminder schedule for your webinar.

### WHAT YOU GET

- Webinar promotion strategy
- Audience and positioning brief
- Email sequence with subject lines
- LinkedIn and X post set
- Newsletter blurb

### WHAT WE MAY ASK YOU

- Webinar objective
- Webinar title / topic
- Webinar date, time, and timezone
- Registration link

**Example request:** "Help me fill seats for my January webinar."

Good to know: Paid ad amplification is advisor-paid and not included.

Reply with **24**

**Timing**
5-7 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors with a webinar on the calendar

# Webinar-to-Follow-Up Kit

## Turn attendees into conversations

Follow-up emails for attendees and no-shows, a LinkedIn recap post, a nurture sequence and a next-step checklist.

Reply with **14**

**Timing**
2-3 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors who just ran a webinar

### WHAT YOU GET

- Attendee follow-up email
- No-show follow-up email
- LinkedIn recap post
- Nurture sequence
- Next-step checklist

### WHAT WE MAY ASK YOU

- Webinar title / topic
- Webinar date, time, and timezone
- Audience type
- Attendee segment

**Example request:** "I ran a webinar on Social Security last week. Give me the follow-up emails."

Good to know: Does not send emails, report attendance, grant CE credit, or claim attendee outcomes.

Lead-Lag Media®

# CE Credit Webinar Hosting

## A CE-eligible webinar, handled end to end

We plan a continuing-education webinar with you and coordinate the CE provider and accreditation process. Final compliance and CE approval stay with you, your firm and the provider.

### WHAT YOU GET

- CE webinar scoped launch brief
- CE eligibility and accreditation status checklist
- Learning objectives
- Session agenda with timings
- Slide outline and teaching points

### WHAT WE MAY ASK YOU

- Webinar objective
- Proposed topic / title
- Target audience
- CE audience type

**Example request:** "I'd like to host a CE webinar for CPAs on estate planning."

Reply with **33**

**Timing**
Scoped per engagement

**How it is delivered**
Planned with you by email, then coordinated by our team

**Best for**
Advisors who want to host CE-credit education

Lead-Lag Media®

# New Client Onboarding Kit

## Make the first 90 days easy to explain

A welcome email, what-to-expect points, document category requests, proposed 30/60/90-day milestones and staff tasks. Collection stays in your firm's secure system.

### WHAT YOU GET

- Welcome email
- What to expect
- Document category checklist
- Proposed milestones
- Staff task checklist

### WHAT WE MAY ASK YOU

- Client segment
- Service scope
- Team roles
- Onboarding priorities

**Reply with** **11**

**Timing**
First draft once we have your answers

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors who want a consistent new-client experience

**Example request:** "An onboarding kit for new clients coming over from a big firm."

Good to know: Not an intake system: no uploads, account opening, form completion or record updates. Milestones are proposed, not deadlines or service promises.

Lead-Lag Media®

# Client Service Calendar

## Give every month a clear service purpose

A January-to-December service plan for one client segment, with a touchpoint, output and owner each month and six first-quarter actions.

### WHAT YOU GET

- Service plan
- Calendar rationale
- First-quarter actions

### WHAT WE MAY ASK YOU

- Client segment
- Service cadence
- Team capacity
- Review turnaround

**Example request:** "Lay out a year of client touchpoints for my top 50 households."

Good to know: Months are illustrative, not statutory deadlines or a mandated cadence.

**Reply with** **9**

**Timing**
First draft once we have your answers

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors formalizing how they serve each client segment

Lead-Lag Media®

# Client Question Reply Kit

## Answer a general client question clearly

Turn one redacted, generic question into a paste-ready reply, a plain-English explainer, balanced tradeoffs and clear triggers for when to refer to a professional.

### WHAT YOU GET

- Paste-ready reply
- Plain-English explainer
- Balanced tradeoffs
- Clarifying questions
- When to refer

### WHAT WE MAY ASK YOU

- Redacted client question
- Client segment
- Jurisdiction context
- Reply length

**Reply with** **2**

**Timing**
First draft once we have your answers

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors who field the same questions again and again

**Example request:** "A client asked whether she should pay off her mortgage early. Can you help me answer?"

Good to know: Personalized security, allocation, buy/sell or tax requests need review and rephrasing. No invented current rules or limits.

Lead-Lag Media

# Annual Client Review Kit

## Walk into the annual review prepared

A pre-meeting kit for a client segment: agenda, preparation checklist, advance client questions, advisor prompts and a complete invitation draft.

### WHAT YOU GET

- Agenda
- Preparation checklist
- Client questionnaire
- Advisor question prompts
- Invitation draft

### WHAT WE MAY ASK YOU

- Client segment
- Review priorities
- Review format
- Review period

**Reply with** **6**

**Timing**
First draft once we have your answers

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors running annual or semi-annual reviews

**Example request:** "Build me an annual review kit for retirees drawing income."

Good to know: No post-meeting recap, personalized recommendations, record access or sent invitations.

Lead-Lag Media®

# Post-Meeting Follow-Up Pack

## Turn meeting notes into clear next steps

Give us the context and commitments. Get a clean follow-up email, an action checklist and optional short message copy, in about one to two business days.

### WHAT YOU GET

- Follow-up email
- Next-step checklist
- Open items and owner map
- Short message copy

### WHAT WE MAY ASK YOU

- Meeting type
- Meeting stage
- Audience / recipient
- Meeting notes or transcript

**Example request:** "Here are my notes from a meeting with a business owner thinking about selling. Turn them into a follow-up."

Good to know: Does not send the email, create tasks, or make promises beyond the notes supplied.

**Reply with** **4**

**Timing**
1-2 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors who want every meeting to end with a clear follow-up

Lead-Lag Media®

# Client Education One-Pager

## A concise handout clients will actually read

A one-page educational handout on a planning topic such as retirement income, business-sale planning, estate coordination or market volatility, with talking points for you.

### WHAT YOU GET

- Final one-page client handout
- Short advisor talking points
- Optional visual concept

### WHAT WE MAY ASK YOU

- Education topic
- Target audience
- Planning situation
- Key points to include

**Reply with** **8**

**Timing**
2-3 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors who want leave-behind material for clients and prospects

**Example request:** "Number 8: a one-pager on Roth conversions for clients in their 60s."

Good to know: Educational only. No personalized tax, legal, investment, or eligibility advice.

Lead-Lag Media®

# Monthly Financial Planning Content Kit

## Sourced monthly planning events, turned into content

Pick the month, event and channels. Get educational social, LinkedIn, newsletter and email drafts in your voice, with source notes. Educational only, never personalized advice.

### WHAT YOU GET

- Selected events for the month
- Source notes
- 3 social posts
- 1 LinkedIn post
- 1 newsletter section

### WHAT WE MAY ASK YOU

- Month or date range
- Selected event/theme
- Target audience
- Channel output

**Reply with** **16**

**Timing**
3-5 business days

**How it is delivered**
PDF and editable Word, in the same email thread

**Best for**
Advisors who want a steady stream of timely educational content

**Example request:** "Planning content for December: year-end tax moves and RMDs."

Good to know: No tax, legal, Medicare, student-aid, or personalized-eligibility advice. No compliance-approval claims.




# Ready when you are

1. Reply to the email this deck came with
2. Send the number of the service, or tell us what you are working on
3. Answer a few quick questions if we need them
4. Get your deliverable back in the same thread

**Not sure where to start? Tell us what would help most right now and we will suggest a fit.**