Lead-Lag Media®

BY EMAIL, NO LOGIN

34 complimentary services for advisors

Reply to the email this came with and tell us what you need, or just send the number. We will ask anything we need to know, build it, and send it back to you by email. There is nothing to log into.

Reply with the number of any service below

1. **Advisor-to-Advisor Introductions**
   Warm introductions across the network.
2. **Client Question Reply Kit**
   Answer a general question clearly, without overreaching.
3. **Monthly Group Meetings**
   A seat at the table, every month.
4. **Post-Meeting Follow-Up Pack**
   Turn meeting notes into clear next steps.
5. **Prospect Call Prep Brief**
   Walk into the next conversation with a sharper plan.
6. **Annual Client Review Kit**
   Walk into the annual review prepared.
7. **Branded Market Commentary Graphics**
   Charts and graphics that match your brand.
8. **Client Education One-Pager**
   A concise educational handout clients can actually read.
9. **Client Service Calendar**
   Give every month a clear service purpose.
10. **LinkedIn Profile Optimization**
    A profile that reads like a practice, not a resume.
11. **New Client Onboarding Kit**
    Make the first 90 days easier to explain.
12. **Referral Partner Outreach Kit**
    Build better CPA, attorney, and COI conversations.
13. **Sourced Market Thread Kit**
    Sourced market threads with ready-to-reuse channel variants.
14. **Webinar-to-Follow-Up Kit**
    Convert a webinar into useful follow-up.
15. **White-Labeled Market Commentary**
    Polished commentary in your voice, ready to publish.
16. **Monthly Financial Planning Content Kit**
    Sourced monthly planning events, turned into educational content.
17. **Newsletter Design & Formatting**
    A template you can reuse, plus your first issue.
18. **Personal Brand Positioning**
    Who you are, said clearly.
19. **Video Editing**
    One recording, many clips.
20. **Advisor Dinner Planner**
    Plan an advisor dinner that fills seats with the right guests.
21. **Email Marketing Support**
    Strategy, template, and campaign setup.
22. **Money-in-Motion Prospect Strategy Pack**
    Discover or develop money-in-motion opportunities into a focused engagement plan.
23. **Webinar Planning Studio**
    Take a webinar from idea to a complete production plan.
24. **Webinar Promotion**
    Fill the room across your owned channels.
25. **Programmatic Ad Management**
    Campaign setup and management, with advisor-controlled spend.
26. **SEO**
    Audit, then a plan you can act on.
27. **Cold Email Campaign**
    Strategy, copy, targeting, and setup, ready for review.
28. **GEO (Generative Engine Optimization)**
    How you show up when prospects ask an AI.
29. **LinkedIn Outreach Automation**
    Relationship-first LinkedIn outreach, ready for advisor review.
30. **PlanPoacher (Form 5500 401(k) Prospecting)**
    Find the plans, frame the conversation.
31. **Podcast Bookings & Media Outreach**
    An outreach campaign to get you heard.
32. **Social Media Management (X, LinkedIn)**
    Always-on presence across X and LinkedIn.
33. **CE Credit Webinar Hosting**
    A CE-eligible webinar, handled end to end.
34. **Website Development & Design**
    A full site that reflects your practice.

Complimentary for advisors in the Lead-Lag Media network. Ad spend, domains, hosting and third-party tool subscriptions are paid by the advisor where they apply. Drafts are for advisor and firm compliance review before use, and no results are guaranteed. Questions: just reply to the email.