



WESTSTAR'S CENTRALIZED MARKETING PROGRAM



Growing together in tomorrow's world

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In today's digital world, 82% of your future prospects will assess you online before deciding whether or not to initiate contact.

In the time it takes to stir a cup of coffee, you can lose potential business without ever knowing it was there.

How many referrals are you getting, yet never meeting?

- When CPAs and attorneys look at your website, do you stand out among your peers, or are you filed away in their mental Rolodex as “just like everyone else?”
 - Does your story resonate with and inspire trust in client referrals researching you?
 - Is it clear who you work with, what makes you unique, what problems you solve, and how you address your clients' needs?
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How many prospects are you attracting and converting?

- Are you attracting new leads?
 - Where are they coming from?
 - What part of your offer attracted them to visit your website?
 - What parts of your website did they read, and how long did they stay?
 - What is your strategy to identify and reach out to them?
 - What is your conversion rate?
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These are key questions, but getting the answers can feel daunting and be time-consuming.

Imagine knowing how many people are looking at your website, what questions they asked Google that lead them to find you, what parts of your website have attracted their attention, and managing your internet presence with ease – all in simple terms, and with specialists just an e-mail away.



INTRODUCING WESTSTAR'S CENTRALIZED MARKETING PROGRAM

All advisors and firms in WestStar Prosperity Group's network can have effective businesses that are ahead of the industry's customer engagement curve. Getting there means empowering you to achieve 3 key marketing goals.

Attract - Grow your customer base by generating and converting qualified leads.

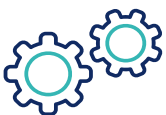
Engage - Connect meaningfully online, across business and social channels.

Delight - Generate referrals by leveraging positive client and COI relationships.

Because quality branding, digital marketing, SEO, and advertising, are essential to gaining our prospects' attention, they're key WestStar priorities.

We collaborate with a leading digital transformation consultancy (IDC) and an international digital marketing performance agency (Algorithm), to provide a growth platform that generates qualified leads, and to deliver valuable marketing and design services at affordable costs.

WestStar's Centralized Marketing Program is a cornerstone of our strategy to help network advisors and DBA firms grow. Pooling moderate monthly marketing contributions from all advisors gives us, collectively, over 50 times greater marketing power than we could have alone.



HOW IT WORKS

The Program does things that no single advisor or firm could readily consider or afford, like run organic and paid-for lead-generating campaigns, and produce great quality marketing and branding materials.

Organic leads are generated via continual SEO content development and website optimization, and experts will tell you that these efforts begin paying off after 12-18 months of steady adjustments.

Paid-for leads are surfaced after one month, and their rate increases over time, by regularly recalibrating our website, content, messaging, and other techniques.

The Program's top 10 qualities and benefits are unpacked below.



1. WESTSTAR'S CENTRALIZED MARKETING PROGRAM DRIVES LEADS TO YOUR DOOR.

The first question an advisor should ask is whether their marketing program delivers enough prospects to make their business successful. Answering the question with a resounding “yes” is our No.1 goal.

Our Marketing Program is designed to both steadily build organic leads, and drive paid-for leads, via digital campaigns and content designed to attract prospects to landing pages on our WestStar Partners' website. The website and its content is set up to function as a lead magnet - a gateway to incoming enquiries - and a “direct-to-you” channel for organic and paid-for leads.

The combination of short and long-term lead generation builds momentum from Day 1. Processes and messaging are continuously refined, and all leads that do not convert into customers are incorporated into a data base for ongoing retargeting and remarketing.



2. OUR PROGRAM PROMOTES YOUR MARKETS, NICHE, PROFILES, AND WEBSITES.

WestStar's organic and paid-for marketing efforts are designed to attract prospective customers to custom landing pages that we develop with you, to ensure that your markets, niches and firm are well supported. What we develop can also be replicated on your own website.

Campaigns drive prospects to these landing pages, then channel them via marketing funnels and lead magnets to your (and your firm's) profiles in the Advisor Showcase on our site.

Multiple filters in the Showcase make it easy for prospects to find the advisors and firms they seek. These filters would typically include-

- **Search by location. Find a Professional Financial Advisor or Firm near you.**
- **Search by service offering. Find an Advisor or Firm specializing in what you need:**

Examples may include Employee Benefits Consultants / Medicare / Individual Insurance / Property & Casualty Insurance / Business Planning / Business Transition / Tax estate planning / Stock Compensation / Divorce / Group (and other) Insurance Benefits / Advice, Investments and Retirement for Women / Federal or State Employees / Legacy planning, and more.

- **Complete the form and an advisor near you will get in touch.**

Whether prospects have a need for an advisor or firm near them, for any niche service - or the financial services we all offer- two clicks will surface your personal and company profiles, both featuring a direct link to your website. Enquiries may also go straight to email, or be directed to your LinkedIn profile or Facebook page.

We help create your company and personal profiles on our Advisor Showcase, polishing them so they sparkle, and creating links and backlinks to your profiles to boost SEO.



3. OUR PROGRAM SAVES YOU SIGNIFICANT TIME AND MONEY.

Having brand marketing and digital performance professionals conducting essential functions such as copywriting, design, SEO, analytics, strategic planning, and media selection and placement, saves a vast amount of everyone's time and gets us all competing to win.

Knowledgeable "always on" resources are focused on growing the digital marketing performance of every advisor and firm in WestStar's network.



4. OUR PROGRAM EMPLOYS TOP DIGITAL MARKETING PROFESSIONALS.

A common problem we all face is that we can't manage what we can't measure. Algorithm is a leading international marketing agency specializing in digital performance. Their understanding of how audiences research and find financial services online - and their proven approach to digital performance marketing - will elevate all firms and advisors via -

- **Search engine optimization.**
- **Web analytics and data insights.**
- **Engaging content and customized media.**
- **Conversion rate optimization.**
- **Paid media campaigns.**

Algorithm brings a proven track record in campaign and digital media management. Their key performance metrics, accurate reporting, insights and analytics, along with KPI measurement and tracking, provide powerful tools to build brand awareness, drive customer engagement, and generate leads.



5. OUR PROGRAM OFFERS ACCESS TO PROFESSIONAL MARKETING SERVICES AT AFFORDABLE COSTS.

WestStar's experienced digital transformation agency, IDC, provides strategic marketing, branding, and design services, along with input and guidance for your marketing needs. These include website and social media profile developments or makeovers, customer persona development, infographics and photo imagery - plus assistance with branding, copywriting, design, content development, and maximizing COI referrals.

IDC's services are backed by easy-to-follow, step-by-step process guidance, and are very affordably priced.



6. OUR PROGRAM INVOLVES AND BENEFITS ALL ADVISORS AND FIRMS.

Well-run centralized marketing programs get plenty of input from the people closest to the customer - the advisors. Ours gives you opportunity to interact and communicate your goals and requirements, to ensure that they're accurately represented on the website and in the Advisor Showcase. You'll meet regularly with our marketing team to provide input on projects, and make sure your niches, markets, and services are well represented and supported

The idea is for you and your business to feature strongly on the website, via blogs we develop together, and participation across various marketing activities.



7. OUR PROGRAM ADVANCES AND SYNCHRONIZES BUSINESS AND SOCIAL MARKETING.

The potential ROI of social marketing offers many convincing statistics as to why all advisors and firms should be actively building their social media profiles.

Mastering the opportunity won't happen overnight, but we make building your professional social presence the priority it deserves to be, and a load of fun. With consistent, moderate effort, and step-by-step guidance, we help you build your profiles and brand like a veteran.

WestStar's network provides the ecosystem for content generation and sharing. In LinkedIn terms this is called a POD. In our network POD, advisors engage with WestStar's and each other's posts to create more visibility, impact, and broader reach.



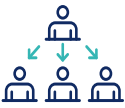
8. OUR PROGRAM GETS THE SPLITS RIGHT.

All our advisors' marketing contributions are put to best effect. First, they cover the costs of administering the marketing effort. Second, they cover the costs of producing advertising and marketing materials, including paid-for campaigns, retargeting campaigns, and marketing communications (blogs, videos, podcasts, events, newsletters, emailers, social media posts etc.). Third, they pay for media advertising placements that benefit all WestStar Partners and Associates. The fund will both produce high-quality advertising and promotional materials and deliver these to customers and prospects. There will be a significant spend on customer attraction advertisements.



9. LARGER FIRMS MAY EMBARK ON THEIR OWN ORGANIC MARKETING IN PARALLEL WITH THE GROUP'S EFFORTS.

Larger firms can lean on Algorithm and IDC's support in developing their own supplementary organic lead generation campaigns. Processes (including technical support, analytics, content development, and digital asset optimization for local search) are offered at an extremely competitive cost, and use quality bespoke content (blog posts, EBooks, emailers, and other media) to build awareness, generate traffic to your website, and advance customer engagement.



10. WESTSTAR'S GATEWAY BRAND PROVIDES THE IDEAL BRAND HALO AND ENDORSEMENT.

WestStar is proud to support our Partners and Associates. Our "Proud Supporters" badge amplifies the halo effect of our WestStar Prosperity Partners brand, and the Group's endorsement for all DBA's.



WESTSTAR PROSPERITY GROUP **SUPPORTERS BADGE**

TO RECAP, THESE ARE THE TOP FEATURES AND BENEFITS OF WESTSTAR'S CENTRALIZED MARKETING PROGRAM:

- Dedicated, professional resources save significant time and money and help synchronize your business and social marketing, with polished and effective results across the board.
- Continuous support makes it easy at every stage, from the initial development of your firm and personal profiles, to generating content that sets you apart.
- Proven methods attract prospects and leads, and distribute them throughout the network to all advisors and firms.
- An iterative process of continuous refinement means marketing and remarketing efforts benefit from the latest and greatest methods to promote your business.
- Larger firms have the opportunity and support to embark on their own organic marketing drive in parallel with the group's drive.
- A strong network endorsement enhances the trust factor of all advisors and firms, and provides the ideal brand halo for individuals and small teams.

Driving growth in the digital world means helping WestStar Network Advisors attract new customers, generate leads, and engage meaningfully across business and social channels.

Our digital marketing platform and gateway brand provides a lead magnet for all advisors and firms, delivering comprehensive digital marketing and branding solutions to everyone in the WestStar Prosperity Group Network.

Don't hesitate to contact me with any questions, and let's chat about growing together in tomorrow's world.



SAM GULLETTE

CERTIFIED FINANCIAL PLANNER™
Co-owner & CEO, WestStar Prosperity Group

10655 NE 4th St, Suite 300, Bellevue, WA 98004

D: (425) 698-1701

O: (425) 429-3031

sam.gullette@weststarparkers.com





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