digital marketing

advisor profile

Please use the following information to set up advisor’s digital marketing campaigns. Refer any questions to Mirna Andrade (mirna@sromarketing.com)

# Campaign INformation

|  |  |
| --- | --- |
| Campaign Package |  |
| Advisor Cost |  |
| Advisor’s State |  |
| Targeting (Location)  |  |
| Targeting (Birth Months)  |  |
| List Targeting: Yes or No |  |

# aDVISOR INFORMATION

|  |  |
| --- | --- |
| Name |  |
| Email (For Public Use) |  |
| Email (To Receive Notifications). If you would like to add additional emails, please separate multiple email addresses with a comma. |  |
| Phone Number |  |
| Company Name |  |
| Website Address |  |
| Advisor Bio |  |
| Advisor Headshot |  |
| BD or RIA |  |
| Disclosures |  |
| Advisor State License |  |
| Advisor Calendly Link |  |
| State Branding |  |

# Workshop INFOrmation

|  |  |
| --- | --- |
| Workshop 1 Date |   |
| Workshop 1 Time |  |
| Workshop 2 Date |  |
| Workshop 2 Time |  |
| Workshop 3 Date |  |
| Workshop 3 Time |  |
| Co-Presenter  |  |
| Co-Presenter Email |  |
| Co-Presenter Bio |  |
| Co-Presenter Headshot |  |
| Webinar Presentation |  |
| Poll Questions |  |
| Waiting Room Video Link |  |

# Workshop Venue INFOrmation (if Applicable)

|  |  |
| --- | --- |
| Venue Name |   |
| Venue Address |  |
| Venue Directions |  |
| Venue Capacity |  |
| Do you have more than one venue? |  |
| Notes |  |

# Additional information

|  |  |
| --- | --- |
| Additional Confirmation Emails |  |
| Notes |  |

# Payment Information

|  |  |
| --- | --- |
| Name on Credit Card |  |
| Credit Card Information |  |
| Expiration Date |  |
| CCV |  |