

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	
Time Zone	
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	
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	