

# PACKAGES

## Table of Services



	Standard	Topaz	Sapphire	Diamond	Foundation
INVESTMENT STARTS AT	\$700	\$1200	\$1800	\$2400	\$2600
Social Media Management*	✓	✓	✓	Y	Y
Blog Management	✓	✓	✓	Y	Y
Email Marketing**	✓	✓	✓	Y	Y
Website Management	✓	✓	✓	Y	Y
Digital Marketing	✓	✓	✓	Y	Y
Project Management		✓	✓	Y	Y
Meeting		Quarterly	Monthly	Monthly	Biweekly then Monthly
Compliance Management LPL Financial Only		✓	✓	✓	✓
Premium Marketing Webinar, Audio, Video, Custom Content, etc		1	2	3	3
Website Redesign		Add On	Add On	Add On	Included
Digital Advertising		Add On	Add On	Add On	Add On

\*All social media services that involve posting to social media accounts requires the client to sign up for a Meet Edgar account. The client is responsible for the monthly fee associated with maintaining the account. The social media platforms managed are Facebook, LinkedIn, and Twitter.

\*\*All Email Marketing services that involve sending out automated emails (i.e. monthly newsletters, announcements, email funnels) requires the client to sign up for an account with one of our preferred Email Service Providers. The client is responsible for the monthly fee associated with maintaining the account. CMS recommends Constant Contact or Mailchimp for these services.

