Management Packages

Transition into a Management Package once the Marketing Roadmap or Building Blocks are completed.

*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.

	Standard	Topaz	Sapphire	Diamond
Investment	$700	$1200	$1800	$2400
Social Media	✔	✔	✔	✔
Email	✔	✔	✔	✔
Digital	✔	✔	✔	✔
Website	✔	✔	✔	✔
Project Management	✔	✔	✔	✔
Marketing Audit	Every 2 Years	Every 2 Years	Every 2 Years	Annual
Compliance Management	✔	✔	✔	✔
Content (Breakdown on the Next Slide)	**Standard**	**+ 1 Premium**	**+ 1 Premium**	**+ 2 Premium**
Digital Advertising			✔	✔
Vendor Management		✔	✔	✔
Meeting		Quarterly	Monthly	Monthly
Branding		+ Add On	✔	✔
Website Redesign		+ Add On	+ Add On	+ Add On

Management Packages

Content Breakdown

*Each month, we craft two professionally-written articles exclusively for our clients to use as their own. These articles delve into a diverse array of financial concepts and lifestyle topics that significantly influence money matters.

	Standard	Premium
Brand Voice Guide	✔	✔
Strategy And Execution Of:		
Optimization and Posting for SEO	✔	✔
Branded, Custom Title Graphics	✔	✔
Keywords and Topics		✔
File Customization and Editing		✔
Source:		
CMS Content Library*	✔	✔
Third-Party Content Library	✔	✔
Client Outline or Recording		✔
Custom Ghostwritten		✔
Output:		
Blog	✔	✔
Audio, Video, Event, Webinar		✔
Posting Management:		
Blog	✔	✔
Youtube, Vimeo, Podcast Source		✔