Marketing & Branding Checklist

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| **ONBOARDING PREPARATION** | **PERSON**  **RESPONSIBLE** | **COMPLETED** |
| Provide a Copy of the Firm Branding Guidelines:  Font Style/Size/Color & Approved Titles |  |  |
| **Phone & Email Branding**  Telephone Branding  ❒ Script for Answering Telephone  ❒ Script for Voice Message on Answering Machine  Email Branding  ❒ Standardized Email Signature  ❒ Standardized Email Out-of-Office Replies |  |  |
| **Customized Branding Items**  ❒ Advisor Biography Added to Intro Kit  ❒ Advisor Biography Added to Website  ❒ Announcement for Email, LinkedIn & Other |  |  |
| **Physical Branded Items**  ❒ Business Cards  ❒ Advisory Team Introduction Kit  ❒ Hardcopy of all Client-Facing Marketing Items  ❒ Letterhead & Stationary  ❒ Envelopes & Folders  ❒ Pens & Note Pads  ❒ Client Gifts & Other |  |  |
| **Digital Branded Items**  ❒ Digital Access to Client-Facing Marketing |  |  |