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 MachineEmail 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 |  |  |