

Investor Update TM



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Memberships



Investor Update TM is

About Us;

Investor Update is a specialist integrated marketing firm assisting the Financial Services sector.

Our Clients;

We work with financial services organisations including; Financial Planners Fund Managers, Accountants, Mortgage Brokers, Aggregators, Originators Securities Dealers, Banks, and Support Services.

Our Mission;

To create best of breed marketing campaigns that produce substantial measurable ROI. Our team are experienced in all facets of the financial services industry and it is for this reason we are a national provider of choice.

This Presentation;

Will touch on our three key service solutions;
Investor Update *Signature* TM; **Research Update** TM; and **Client Protect** TM



Investor Update™ focus

All of our services concentrate on;

1. Identifying and structuring lead channels and increasing sales conversions
2. Executing FSRA | Privacy Audited and compliant marketing campaigns
3. Meeting adviser client contact requirements under FSRA regulations
4. Increasing adviser client retention through professional client relations
5. Increasing client base financial product diversification
6. Growing remunerated client contact hours by way of educating adviser client bases and prospects of the general financial planning options which may interest them
7. Building long term client satisfaction and maximising advisor-client communication

Why select us;

Unlike many Marketing Firms, Investor Update™ is a niche service provider specialising in ...

- a. The Financial Services Industry
- b. Marketing Financial Services Products



Investor Update TM (Service Offering 1)



Investor Update TM eNewsletter
Signature Solutions



Investor Update TM (Service Offering 1)

What is Investor Update Signature Solution?

Investor Update TM *Signature* Solutions is an eNewsletter & Newsletter solution for financial advisers, allowing them in a low cost capacity, to deliver relevant articles and news relating to the economy and the financial products their clients have subscribed to or invested in.

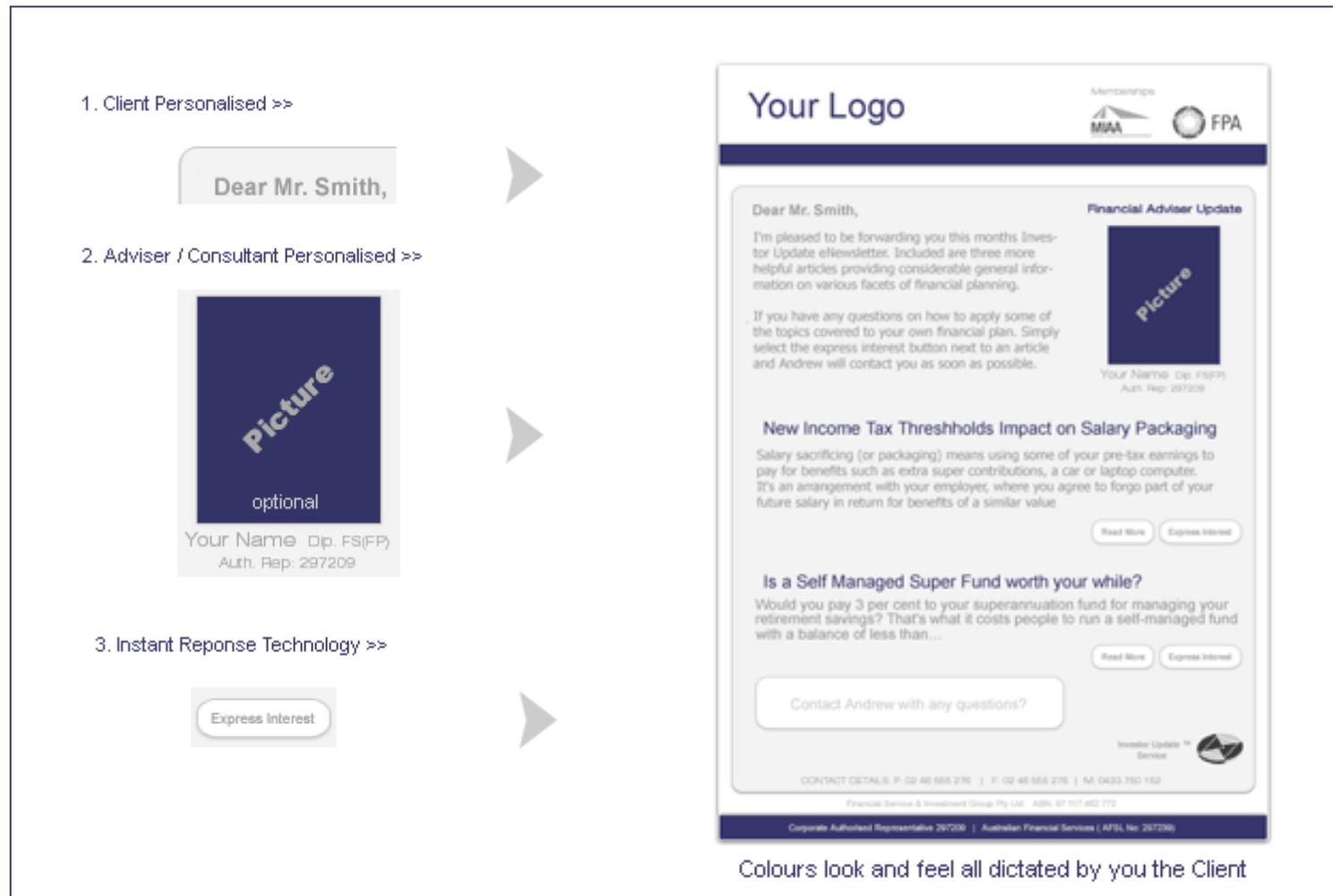
What are the features?

1. Professionally written and compiled articles and information
2. eNewsletter delivered monthly at a fraction of the cost.
3. No need to hire costly in-house writers, editors, technical know how and spend on expensive delivery technology.
4. Direct Response Technology
5. Full Reporting & Tracking



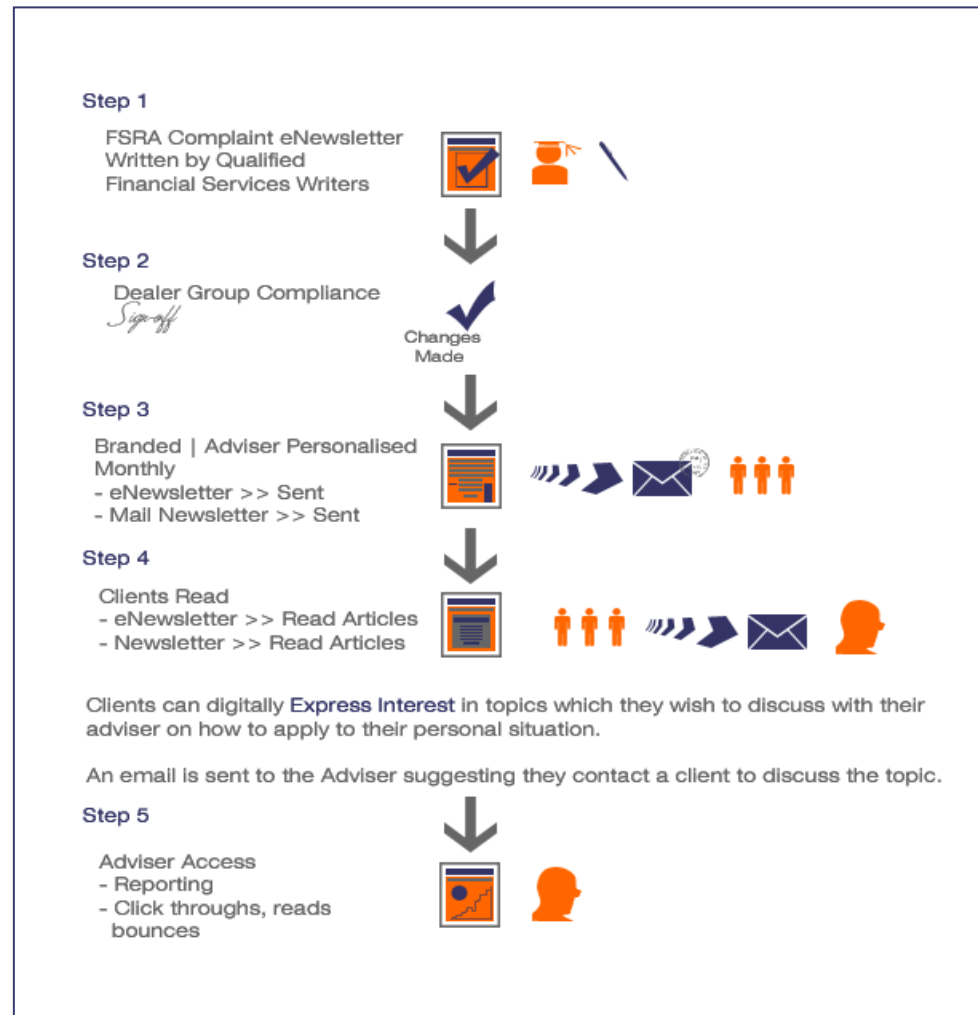
Investor Update TM (Service Offering 1)

Example Investor Update (Diagram)



Investor Update TM (Service Offering 1)

Investor Update Process (Diagram)



Investor Update TM (Service Offering 1)

Investor Update *Signature Solutions* Will;

1. Increase paid client contact hours and commissioned revenue
2. Increases lead generation via our patented direct response technology
3. Improves client relationships
4. Provides a dialogue with clients
5. Complements adviser & dealer group website and other marketing materials
6. Provides measurable results



Research Update TM (Service Offering 2)



Research Update TM eNewsletter
eDelivery Research Solution

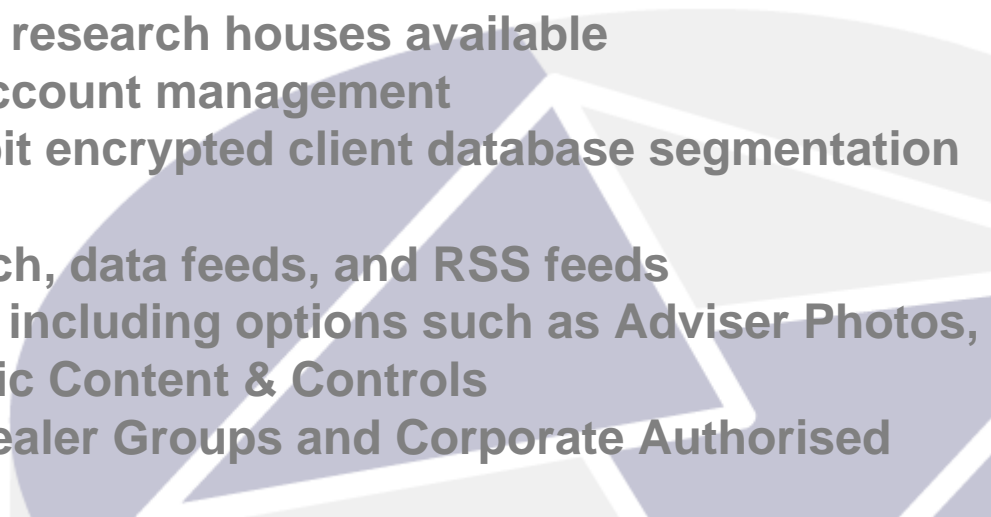


Research Update TM (Service Offering 2)

What is Research Update?

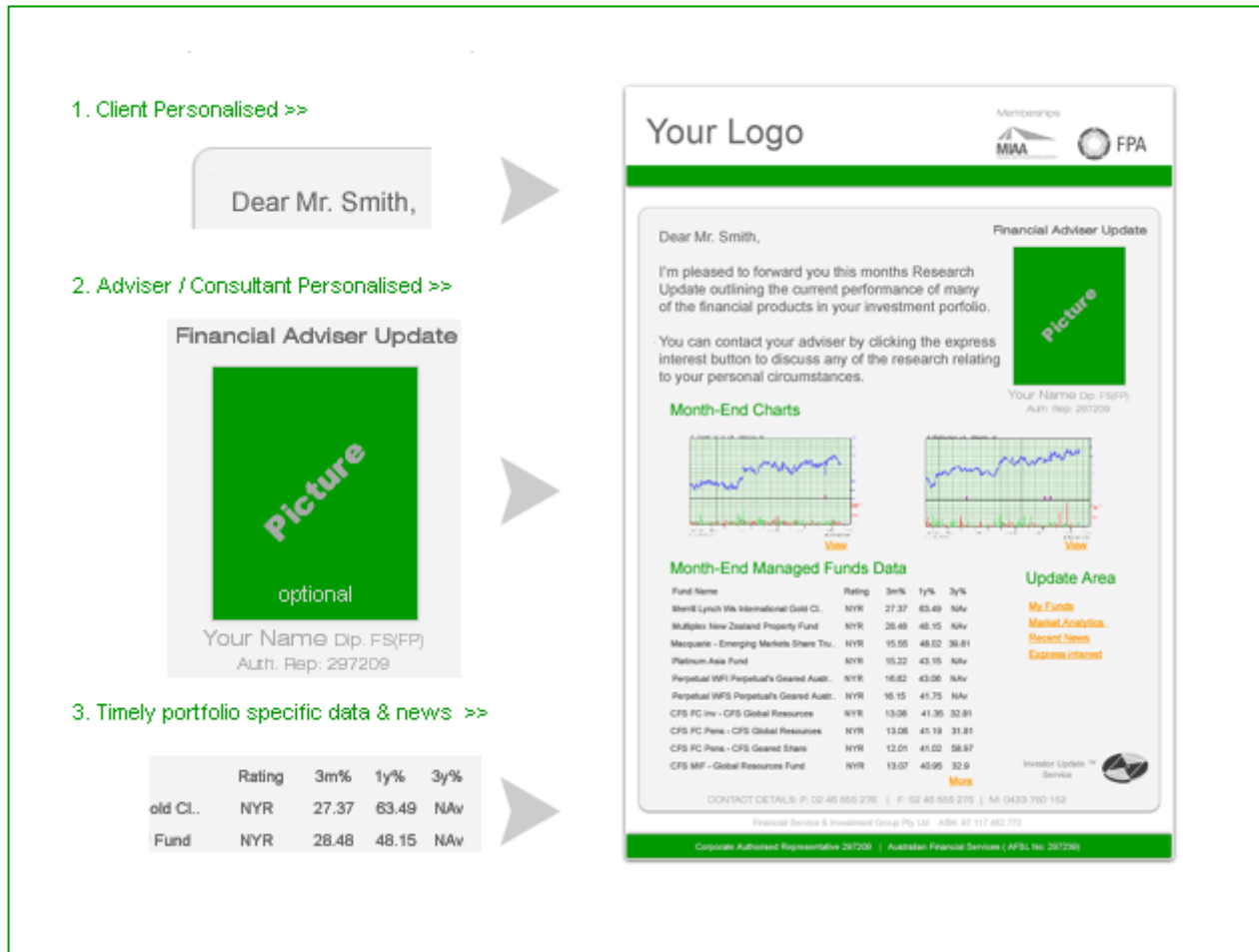
Research Update TM is a service solution for financial advisers to deliver up to date research and news relating to the economy and the financial products their clients have subscribed to or invested in. It differs from Investor Update *Signature Solutions* in the sense that it concentrates more on timely market data delivery on a daily, weekly, or monthly basis.

What are the features?

1. Outsourced FSRA | Privacy Audited eResearch Newsletter Service
 2. Research from several different research houses available
 3. Full End-to-End personalised account management
 4. Automated online, secure 128-bit encrypted client database segmentation and management
 5. Content choice between research, data feeds, and RSS feeds
 6. Personalised newsletter design including options such as Adviser Photos, Trade Dress & Branding, Dynamic Content & Controls
 7. Two tier branding options for Dealer Groups and Corporate Authorised Representatives
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Research Update TM (Service Offering 2)

Example Research Update (Diagram)



Client Protect™ (Service Offering 3)



Client Protect™
Financial Services Campaign Design



Client Protect TM (Service Offering 3)

What is Client Protect?

Client Protect is our integrated marketing campaign design service. Its aim, is to provide end-to-end eBusiness | Marketing solutions for companies in the financial services sector.

Key Features?

1. FSRA compliant Marketing Campaign Design
2. Focus on producing campaigns that deliver measurable ROI
3. Experienced financial services Marketing advice
4. Creativity is our strategic strength
5. Cost effective media procurement services



Client Protect TM (Service Offering 3)

Marketing Tactics & Services we may incorporate in campaigns we design;

TVC Television
Sales Strategies
Database Segmentation
Website Development
Print (Newspapers)
Marketing Planning
Direct Marketing
Web TV
Print (Magazines)
Lead Generation
PPC Pay Per Click Ads
Print (Trade Pub.)
Branding

Specialised eMail Marketing
Radio
Graphic Design



Thank you

Questions?

