

Advertising Guide

Direct Marketing

Whether traditional letter, explanatory email or more visually eye-catching mailer, direct marketing works well because it is targeted specifically to your chosen recipients. Whether from a purchased data list or from your own database of contacts, you can carefully select those who may be interested in equity release by segmenting them based on age or life stage. With a clear call to action – your phone number or email address, or a direct clickthrough if sent via email – you can easily measure the response rate to your campaign to see how well it has worked.

For more visual mailers, you can use email software which lets you create your own designs. Providers such as mail chimp or campaign monitor are a good place to start.

Keep your tone professional but personable, using simple clear language and making it interesting so that prospective clients want to contact you to find out more.

[Direct marketing templates](#)

Press Ads

Advertising in printed publications is a more costly approach but can be very effective. Advertising in local press or magazines specific to the customer age group for equity release could be an effective way of attracting new clients.

A simple, bold headline, a strong image and a call to action by phone, email or online via your website are a good starting point to attract interest and get a direct response.

[Press ad templates](#)

Events Advertising

A presence at the big events such as the Financial Services and Mortgage Business Expos can be a good way of meeting potential introducers who are advisers, but not qualified themselves to advise on equity release, although this can be quite a costly approach. Running your own smaller events or seminars can be a much more cost effective way to showcase your services. You can invite existing clients who have recently retired or who have expressed an interest in retirement planning, alongside potential clients who have been recommended to you. They may be interested to find out more, and guest speakers such as solicitors who are able to present and answer questions about wills or inheritance tax planning may be an extra draw for your potential client base.

Separate adviser-facing seminars are also an option, where you can showcase the benefits of becoming an introducer and recommending clients who may be interested in equity release. Remember though that advisers are busy just like yourself, and those who are local and within easy travelling distance may be more likely to respond.

Sending invites well in advance is a good idea, as well as asking your potential attendees if there are any specific topics or issues they would like you to cover, showing that your seminar and your overall service is all about catering to their needs.

[Events banner templates](#)

Our toolkit has events banner templates which you can use to help design your own, or you can borrow one from us if needed – see our [FAQs](#) section for more details.

Social Media

Social media is a cheap and easy way to reach a wider audience, helping you to raise awareness of your services and expertise. While there is a common misconception that the older generation do not use social media, the 2015 Ofcom report showed that 49% of UK internet users aged 55 to 64 are active on social media, an increase of 41% since 2007.

Using Twitter, Linked in, Facebook or YouTube could help you to build relationships with both new and existing clients. Interesting updates and relevant posts area great way of engaging with both potential customers and potential introducers amongst the professional network.

Feel free to visit our pages to see how we use [Twitter](#) and [LinkedIn](#)

Website

A good website is important for the credibility of your business. Up to date information, a simple design and easy navigation are the key things you need to get right, as well as making sure your contact details are easily found.

Google analytics is a great tool for monitoring the use and navigation of your website to see if it's as effective as you would like. If you would like to give your website a refresh, you can find prospective web developers through a simple internet search, to see if they are a fit for both your needs and your budget.

For example, you could request a content managed system which will enable you to add updates yourself, or ask for help with Search Engine Optimisation (SEO), enabling your website to show higher in the rankings when people search for your services online.

Your website can also be a great way of gathering contact details of potential customers. If you offer visitors the opportunity to sign up for email updates or a regular newsletter, interested parties may come to you rather than you having to seek them out. It's important though, to provide them with an opt out option when it comes to using their details for marketing promotions, as this is a legal requirement in respect of the Data Protection Act.

Feel free to visit [our website](#) for ideas you may like to use.

Publicity

You can create your own publicity by sending out press releases to local and regional press, but to be successful, it's important to take the right approach. Latest news highlights, developments or trends in your business may be of interest to journalists who are looking for a story, but it's important to approach the right newspapers or websites that cover your area of business. Keep your language clear and simple, with the key need-to-know messages in the first couple of paragraphs.

A customer research piece with a wider community context could be a good initial approach, particularly if it is timed with an upcoming event or recent related piece of news. And case studies can be a great way to showcase your services as part of a feature piece, with real life examples of the benefits they can give.

[Case study templates](#)

Local journalists who report on financial services are a good starting point for contact, and it's a good idea to introduce yourself by giving them a call first, rather than just sending them an unsolicited story. Developing a good relationship could secure an ongoing arrangement whereby you could become a trusted supplier of information, setting yourself up as an expert who may be asked for comment on other stories for publication in the future.

Posters

If your premises has a shop front, you can also advertise to passers-by with a simple poster in your window to draw their attention and possible interest.

If you have existing third party relationships with other professionals such as accountants, solicitors or estate agents with a similar clientele, you may also be able to organise a reciprocal arrangement whereby you can display each other's advertisements in your shop front windows.

[Poster templates](#)