

Project Overview

This project covers a strategic 24-month marketing proposal for Small & Associates Financial. Key deliverables include marketing consulting, suggested company name update, positioning statement, new corporate video, digital advertising approach, social media approach, revamped marketing print collateral, and website enhancements to grow lead generation and new client opportunities.

Scope of Work

1. Marketing Strategy, Plan and Timeline - \$9000 (one-time fee)

Develop effective marketing strategies to enhance Small & Associates Financial brand impact and customer engagement.

Key Activities:

- Analyze market trends.
- Develop comprehensive marketing strategies.
- Analyze Small & Associates Financial's potential digital presence.
- Monitor performance metrics to inform continued improvement.

Evaluate:

- Target markets (type, titles, geographic area).
- Areas of concern or needed improvement.
- Analyze website performance via Google Analytics.

Deliverables:

- Marketing platforms to use moving forward.
- 24-Month Detailed Marketing Strategy, Plan, and Timeline.
- Creative concept and graphics for use throughout all mediums.

2. Agency Retainer - \$1,500 per month

The agency retainer will provide consistent support, ensuring Small & Associates' marketing efforts remain proactive rather than reactive. Group Five West will act as an extension of your team, fully immersed in your brand to deliver measurable, meaningful results over time.

- Scheduling regular meetings or check-ins to ensure alignment
- Proactive suggestions for new opportunities

Performance Tracking and Reporting

- Set up and monitor metrics, KPIs, and analytics around campaign performance.
- Detailed performance reports with insights and recommendations for improvement

3. Corporate Video - \$25,000 (one-time fee)

Develop key components and messaging for new company video

- Location = Local
- Plan out the project timeline.
- Outline a script/storyboard.
- Shoot video.
- Edit video and post-production.
- Finalize project.

4. Digital Advertising - Management - \$900 per month

Deliver a targeted digital advertising approach

- Set up back-end targeting.
- Create ad assets.
- Manage, schedule, and adjust as needed.

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Exhibit A

Ameriprise Financial Services, LLC (Small & Associates Financial) 24-Month Marketing Agreement
January 2025 thru December 2026

5. Digital Advertising Ad Spend (Buyout) - \$2,500 per month

- Monthly spending for designated mediums

6. Social Media Content Creation - \$750 per month

- Set up platforms
- Create digital assets, including social media graphics and other visual content.
- Manage and schedule all social media.

7. Marketing Collateral - TBD

Revamp key print materials for greater consistency, professionalism, and impact.

- **Key Deliverables:**
- Redesign and produce branded templates for presentations, proposals, and reports.
- Refresh essential marketing materials, such as brochures, case studies, and internal communication documents.

8. Website Enhancements/Updates - \$6,000 (\$3,000 per year)

- SEO improvements
 - Suggested home page design and content.
 - Develop tailored content delivery for target audiences on the home page.
 - Addition of Blog to website.
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group five west

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Exhibit A

Ameriprise Financial Services, LLC (Small & Associates Financial) 24-Month Marketing Agreement
 January 2025 thru December 2026

	Year One	Year Two
1. Marketing Strategy, Plan and Timeline	\$9,000.	
2. Agency Retainer	\$18,000.	\$18,000.
3. Corporate Video	\$25,000.	
4. Digital Advertising - Management	\$10,800.	\$10,800.
5. Digital Advertising Ad Spend (Buyout)	\$30,000	\$30,000.
6. Social Media Management	\$9,000.	\$9,000.
7. Marketing Collateral	TBD	TBD
8. Website Enhancements/Updates	\$3,000.	\$3,000.
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TOTALS	*\$104,800	*\$70,800

*Pricing based on Approval of 24-Month Contract



12/20/24

Exhibit A

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