



Strategic Marketing Services Retainer Project Summary 5-MAR-18

COMPLETED PROJECT TASKS:

- Cornerstone Wealth Management Login Sheet emailed February 7, 2018.
- High resolution "Email" signature logo emailed January 31, 2018.
- Provided Cornerstone Wealth Management office signage information, mock-ups, past DLB client example, and sales contact at Signarama emailed January 23, 2018.
- Modified and provided black and white Cornerstone Wealth Management logos with the disclaimer removed as .png and .jpeg formats. Emailed January 17, 2018.
- Copywriting for the Consolidated Report Email Introduction / Brand Announcement. Emailed January 10, 2018.
- Thanksgiving HTML Email for created, approved and launched (11-21-17) with provided list from Cornerstone Wealth Management.
- Launched a Cornerstone Wealth Management Press Release "West Pasco County Now Has an Accredited Investment Fiduciary" November 2, 2017.
- Deliverable: Cornerstone Wealth Management Press Release Analytics. Emailed November 14, 2017.
- Copywriting of Chuck Walker Talking Points for Video Shoot. Emailed August 28, 2017.
- Professional Photo Shoot, half day at the Cornerstone Wealth Management Office. August 29, 2017.
- Cornerstone Wealth Management Kick-Off Meeting Notes emailed August 21, 2017.

COMPLETE – Branded Stationery Package Sent to Printer

- Business Card with revised design.
- Letterhead.
- #10 Envelope.
- #9 Return Envelope.

COMPLETE – Website Modifications:

- Email redirect: CWalker@returnonlife.us to redirect to CWalker@cfpfl.net.
- Changed the color theme on dropdown menu from white.
- Updated Cornerstone Wealth Management Team Photos.
- Create new copy for Team Bios and upload to website.
- Larger Cornerstone Wealth Management logo uploaded to website.
Logo reverted back to default template size.
- Integrated Social Media Icons with links to new Cornerstone Wealth Management Social Media Profiles: Facebook, LinkedIn, and Twitter.

COMPLETE – Google My Business Modifications:

- Submitted Cornerstone Wealth Management for verification Google Business Listings – Currently active.
- Update with new images from on-location photo shoot.

COMPLETE – Social Media Marketing Schedule:

- Cornerstone Wealth Management’s social media posts currently originate from the current website feed, as well as scheduled, custom posts from Digital Lightbridge.
 - Digital Lightbridge posts are listed on the **Social Media Calendar: CFP-SM-Calendar-2018-V2.pdf**.
 - All social media for the various platforms have already been created and are set in advance to automatically post on the day indicated on the calendar.
 - **Misc:** Published recently provided LinkedIn Article to Social Media Facebook, Twitter, Google+ and the Cornerstone Wealth Management LinkedIn page.
<https://www.linkedin.com/pulse/brush-fire-forest-chuck-walker>

PROJECTS IN DEVELOPMENT - HTML Email Campaign - Return on Life

“Get to Know Chuck”

- **Cornerstone to determine which email contacts will receive the email blast.**
- **See attached Proofs to be approved: CFP-ReturnOnLifeSeries-Emails-V3.pdf**
- HTML Email template for each Personal Quote, Series of Three
- For the Thanksgiving Message we used the entire list provided to us.

NEED FEEDBACK – Email address changes at bottom of website and on LinkedIn:

- In an email from January 31, will compliance have a problem with changing the email address at the bottom of the website to say ReturnOnLife@cfpfl.net?
- The email on LinkedIn that reads cwalker@cfpfl.net is not seen by public viewers so there is no need to update that email for branding purposes.