

API Marks 10th Anniversary

(Continued from page 1)

for all of the blessings bestowed on me and my family because you have placed your faith in me and my company. Your confidence and trust has allowed us to grow to serve 1,800 advisory firms and become a pivotal influence in the independent advisor arena. Your support has allowed this little baby of a business to grow into a strong young company poised to grow more and serve you better. But I have to admit that this last year was in many ways our most challenging yet.

API reinvented itself over the past year. As happens with all fast-growing startups at some point, API lost its innocence. Some of the people that had helped us grow so much over the last few years moved on and were replaced with experienced marketing professionals. Enthusiasm was no

longer enough to run on. Business processes once kept in people's heads were written down. Employees were provided medical and retirement benefits. API was systematized, made more scalable, and the people who work here were made more accountable. As you're seeing in the items described in this newsletter, we've made it easier for you to get great marketing products at a good price.

And I'm thrilled with our new products. Our Template Marketing Copy Catalog makes it a cinch to get a professional brochure or website complete with marketing copy. Our Elite Brochure is a better value in an eight-page, bound brochure than you'll find anywhere. And our client portal websites, now headed for beta testing, will set a new standard for Internet marketing and serving clients over the

Web by personalizing websites to each of your clients.

As API passes its 10th anniversary, we are deeply committed to continuing to provide you with innovative marketing products, great service and superior value. We are committed to being better, doing more and serving you better than any other vendor in this space. No other vendor offers our range of marketing products, our expertise, and our ability to customize materials at a price you can afford. Thank you for helping us getting here.

A Message From Our CEO

"We are deeply committed to continuing to provide you with innovative marketing products"

Advisor Products, Inc,
1025 Old Country Road, Suite 223
Westbury, New York 11379

Website:
Advisorproducts.com

Phone:
888.274.5755



Marketing Smart

Marketing Ideas for Advisors

API Marks 10th Anniversary with Gratitude

It's hard to believe it's been 10 years since I stopped working at Worth Magazine and started a client newsletter for independent advisors out of my home. What a ride! What huge changes!

My son, Jason, was a baby still and my daughter, Alison, was just starting kindergarten. My wife, Mindy, was commuting to Manhattan daily, running an institutional fixed-income sales desk. Now, I have two teenagers. My 15 year old daughter is dating a high-school senior and last week told me she wants to study abroad next year. My 13 year old son has told me he will not be going to camp this summer because he wants to work full-time for me. And Mindy is now our accounting manager and basically report to her in the office as well as at home! About the only thing that has not changed is that I still produce my monthly column for advisors, which is now called The Gluck Report and appears in Financial Advisor Magazine, only after panicking and jamming it together on deadline every month.

Seriously, though, it has been a wild ride and I am deeply grateful to you

(Continued on page 4)

Drastically Simplifies Your Marketing With API's Template Copy

Leveraging our experience in creating marketing materials for 1,800 independent financial advisors, API recently launched its Template Marketing Copy Catalog™.

When you buy a brochure or website from API, you can license marketing copy with it. The 65-page catalog contains more than 140 different copy blocks written to fit in API brochures and for use on API websites. The catalog is indexed by subject so your firm can quickly find the marketing copy best suited to your needs.

Is your firm a fiduciary? Do you work on a fee-only basis? Or you are a

(Continued on page 2)

The Best Brochure Ever Made For Independent Advisors

No brochure ever offered to advisors is as easy, effective or as great a value as API's new eight-page Elite Brochure.

Easy. You pick a design from our assortment of templates, and we customize the template design with your logo and branding. From our 65-page catalog of template marketing copy, you select the text blocks that best suit your firm. You get a customized brochure without putting many hours of your time into directing the design and copy.

(Continued on page 2)

Beta Testers Sought For New Advisor Sites Platform

AdvisorSites, the website development arm of API, has been working for months a revolutionary new platform. The new platform provides each of your clients a personal website.

~ If you're client is a retiree, he will see articles about retirement. If he is a business, owner, he'll see articles about retirement. Each client gets a unique experience from your website. You can select the topics for clients or they can do it themselves. Personalized content will also be emailed to your clients.

(Continued on page 3)

The Best Brochure Ever Made

(Continued from page 1)

Effective. An eight-page 8.5" by 11" bound brochure, the Elite is substantial. Laid out to contain detailed information about your firm's competitive advantages and your target clients, Elite's rich graphic and elegant layout make your firm look as big as the Wall Street giants.

Great Value. If you try to design and print an eight-page brochure anywhere else, it will cost you thousands of dollars more. Because we are experts at mass customization for financial advisors and have created proprietary technology and workflow for using template copy, template design and digital printing, you benefit with huge savings.

API has created brochures for hundreds of advisory firms, and Elite Brochure is the culmination of our years of experience. With this product, API has totally reinvented the way advisors create brochures. This brochure is like no other ever offered to advisors and API is the only firm that can offer it to you.

"...make your firm look as big as the Wall Street giants."

Drastically Simplifies Your Marketing

(Continued from page 1)

registered rep who picks stocks and sells insurance? No matter what type of practice, you'll find marketing copy that highlights your strengths. Template copy can be customized by an API writer, drastically cutting the cost and effort of creating your own marketing copy from scratch. This product revolutionizes marketing for independent advisors by making it easier than ever to create a brochure or website that articulates your competitive advantages. All of the template copy was written or edited by API founder and CEO Andrew Gluck, and API is committed to continually add to its already voluminous catalog of template marketing copy.

Anyone who might benefit from it, such as people interested in purchasing a product or service. You can compile a mailing list from business reply cards, customer information sheets, business cards collected at trade shows, or membership lists. You might consider purchasing a mailing list from a company that serves your target customer.

Next, establish how much time and money you can spend on your newsletter. These factors will help determine the length of your newsletter and how frequently you publish it.

"...drastically cutting the cost and effort of creating your own marketing copy from scratch."



Beta Testers Sought For New Advisor Sites Platform

(Continued from page 1)

~ The new platform is programmed using the latest Microsoft .NET language, vastly simplifying integration of your website with your web-based applications and data providers using Web Services. Your clients will be able to look up portfolios, retrieve their financial planning data and view personal data from your website.

~ This supports your independence by reducing your reliance on your Application Service Providers for displaying client-facing data from your financial planning, performance reporting, customer relationship management and other applications. Instead of your clients having to log into multiple sites to view all their data, API will be able to provide it in one place. API has not interest in which applications you use to conduct your business, and you won't have to rely on custodians, portfolio management software companies and other firms that control your client data to integrate pages your clients will view. Since Advisor Products provides your clients a portal to view web-based account and personal data but does not actually hold all your client data, it supports your independence.

Advisors who participate as beta testers in the launch of the first phase of the new platform will set up personal portal sites for each of their clients based on their clients' profiles. Participants will receive a 50% discount on the first-year subscription to the personal portal. If you would like to participate, please email sgordonson@advisorproducts.com.

Automatically Updating Your Website Every Month

Advisors who update their websites are always the ones who benefit the most for their sites. It's common sense that updating your website once a month is a marketing necessity. When prospects and clients come to your website and see fresh content, it makes your firm look larger and more professional. That helps build your credibility and makes it easier for you to get new clients.

Since we know you don't have time to update your site, API has made it effortless. You can now automatically update your site with new Articles of Interest every month. You simply log into the AdvisorSites BackOffice, go the page Articles of Interest page, and click on the checkbox that says "Automatically Update Articles Of Interest," and every month a new batch will automatically appear on your site and the old batch will no longer be displayed. Previously, you were able to automatically update Financial Briefs and Featured News in the same way. Articles of Interest is a list of links to articles about wealth management and other topics high-net-worth individuals want to read about. It is available with an AdvisorSites Platinum license. No web vendor to advisors makes it as easy as API to update your website continually with new content of interest to high-net-worth individual.

Junk Mail Check Every Day

Junk email was supposed to be fixed by now. Instead it's become worse. If you use Outlook - and most advisor do-it automatically places some of your email in a junk folder. If you're not using this feature in Outlook, you may want to start. Outlook's junk mail filter won't be as effective as using a permission-based junk mail program like ChoiceMail from DigiPortal, but it's a lot simpler.

And if you're using an ISP that filters junk mail for you-

Advisor Products hosts email and filters out junk for hundreds of advisory firms - then you're already cutting down on a lot of your junk and the Outlook filtering system may work fine for you.

One tip if you use Outlook's junk mail filter: check the Junk folder every couple of days. Some important emails can get filtered as junk and you need check the Junk folder often. That is a bit of a hassle. But checking your junk folder once a day for three minutes is a lot better than receiving junk mail all day and picking through it as it comes in.

