



Author • Speaker • Motivator • Coach • Trainer • Mentor

The Bramson Report

August 2009

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Memo

It's August and time for another issue of The Bramson Report. Actually, this is long overdue, but I've been working on finishing up the Training Series (noted below) that I haven't had time to write this newsletter. The goal is monthly, and hopefully, I'll be able to do that. Since it's free to you, I guess I have some leeway.

In any event, my mission statement includes the line, "Getting wisdom and information from those who have it, to those who need it." So, enjoy these marketing and practice management ideas to help you grow your financial services business.

This e-newsletter is free so feel free to pass it along to others AND encourage your peers and colleagues to sign up. If this issue was forwarded to you, and you would like to receive future issues, please click [here](#) to sign up, or the SIGN UP HERE box in the left column, and we will be sure you do not miss a copy.

What's New?

My Real Life Marketing and Practice Management Training Series is new! A huge thank you to Scott Bowman, for his expertise in the taping, editing, and production of these training modules. The initial feedback from the few people that have seen these is extremely positive. There is over seven hours of content on the 12 modules, and for those who complete the training and register as an associate (currently, part of the tuition for taking the training course); I have over 150 audio clips to answer your questions, and explain concepts further. There is nothing like this in the industry and I am pleased to bring this to the financial services industry.

Here are the titles of the twelve modules that are included in the training:

1. Motivation, Marketing and Positioning
2. The Pyramid of Financial Needs
3. Referral Techniques That Work
4. Practice Management
5. Analogies and Stories
6. Life Insurance 101
7. Assembly Line Mind
8. Wisdom Versus Information
9. Embracing Technology to Save You Time and Money
10. Target Marketing
11. You Can Have It All
12. Partnering With the Media to Gain Instant Credibility

This training series would be very appropriate for any and all of the following people:

New advisors: This is a perfect starting point for learning some valuable systems for recordkeeping, marketing, prospecting, selling, presenting.....everything you need to start and build a very successful career.



[ImediaPro](#)

[Kevin Hogan](#)

Experienced advisors: Especially those who are in a bit of a burnout mode, or those who would like to simplify their lives. I share many ideas on one of my favorite topics....."You Can Have it All" Grow your business, work less, AND have more fun...all at the same time.

Companies and organizations: This is an excellent fundamental training series that adds consistency, and substance to your organization. Marketing and Practice management are the most important issues facing advisors and firms, but there is little information "out there". With my 26 years of experience, MDRT Top of the Table production, I share all of the ideas that have helped me thrive in this very competitive industry.

If you are looking for more information or want to chat with me about these services, go to www.toddbramson.com or call me direct at 608-271-3669 ext 218. I'm currently planning my schedule through 2010 and interested in booking keynote speeches, breakout sessions, and other training sessions. My available times are filling up fast, so call me right away if you have a need for these services.

Talking Points

Click the play button below to listen to the strategy and actual language Todd uses to obtain referrals:



In this difficult economy, you have to stand out. You have to be different. So, do that by providing service that is "off the charts" excellent. You'll get inspired as you read Ken Blanchard's book, *Raving Fans*. Here's my audio book review:



Resources

I have just completed the third edition of Real Life Financial Planning for the New Physician, with co-author Marshall Gifford. This goes to print in just under two weeks. I am taking pre-orders for this book at \$15 each. Any orders placed and paid for at my store at www.toddbramson.com within the next week will receive free shipping, and one extra for every ten ordered. This book is an excellent tool to hand out to your medical students, residents, fellows and new physician prospects and clients. It places a priority on debt management, risk management, savings and budgeting. This supports your efforts to educate and market yourself and your services, AND is compliance approved.

Associates

For those of you who are already familiar with the associates only section of www.toddbramson.com, I invite you to stop back in. I've added more book reviews, some FAQ's and expanded the discussion under talking points for each of the 12 modules. I appreciate all of your feedback you have given me and I read each and every suggestion and question. Keep them coming at www.asktoddbramson.com!

Ask Todd

"I'm new to the business Todd, how do I begin marketing and growing my business, when I really don't have much money to spend?"

First, you have to think like an entrepreneur. This is your business. This creatively, and hustle. You may need to borrow a little money from a relative, bank, or credit card advance, just to have some dollars to work with. Every business owner faces this dilemma. But for some very easy ways to get some big mileage for you marketing dollars, consider trying any of the following:

- When you run across a good article in a magazine, that has some application to one or more of your clients...buy some extra copies of the magazine and send to your prospect and/or client

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with a short note written on it: I ran across the following article and immediately thought of you..let's get together and chat about it. I'll give you a call early next week." So, for only a few dollars, you provided some great information, got their attention, and will most likely get the appointment.

- Have a second set of business cards, fax cover pages, and email autosignatures prepared that you use when approaching a prospect or client in a specific target market you are trying to pursue. For only a few dollars, you have created a target market. For example, the business could have a small line at the bottom: "Specializing in the financial needs of engineers." Or...whoever you are trying to target.

- Sign up for SendOutCards. This amazing service allows you to get greeting cards on any and every topic as efficiently as any marketing idea I know. You can personalize them. It only takes a few minutes and for the card, the service, AND the postage, you can really stand out from your competitors. Use for follow ups, thank you's, birthdays, anniversaries, etc. etc. etc. Click on the link on my website, or even in this newsletter to get more information.

I hope these ideas help you get started and if you think this was helpful...you have to order and watch the DVDs. Until next time, hit 'em straight. (It's summer, and I had to have a golf line in here somewhere!)

The Bramson Report is a periodic e-newsletter brought to you by:

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