

Services & Pricing Guide



PERFECTLY
planned content

Welcome!



We help financial planners to create exceptional content so they can move confidently toward their goals.

Through our content marketing services, we help small business owners and financial planners tell their stories, generate and convert more leads, and nurture existing client relationships. However, we've found that most marketing professionals either provide custom services that require a lot of time and collaboration from their clients, or they offer an automated service that consists of underwhelming canned content.

Why not have the best of both worlds? Our team believes that it's possible to have an automated, scalable marketing strategy that's still tailored to your unique business and audience.

Ready to learn more? Let's dive in.

Zoë Meggert
CEO & Founder

Client Testimonials



Aaron Terwedo,
FPQP™
TFS ADVISORS

Perfectly Planned Content has helped us stay on track with our content plan.

They have not only helped us put our thoughts to paper but have also helped increase our following.



Lauren Oschman
VESTIA
PERSONAL
WEALTH
ADVISORS

PPC took the time to understand our vision, help us design a content calendar, and even gone as far as to hone their writing style for us over time to be what our clients (and compliance officer!) want to see.

I am so proud of our content and it's huge thanks to the PPC team for making it happen!



Gretchen Behnke
PEARL
FINANCIAL
PLANNING

Fantastic experience. PPC already knows financial planning.

They got to know my brand and my ideal client and wrote in a voice that sounds natural to me.

The unexpected part was the shift that occurred for me when I saw myself as a professional and my business in the way their words described.

Frequently Asked Questions

✓ 01. HOW LONG DOES IT TAKE TO SEE RESULTS?

Just like with financial planning -- content marketing is a long-term strategy. Most of our clients stay with us for multiple years, but we tell new clients to expect tangible results within 6 months.

✓ 02. HOW DO YOU TRACK SUCCESS?

We track quarterly analytics using Google Analytics and compare them with your unique goals. In general, we track site traffic, engagement, keyword rankings, and more.

✓ 03. WILL THE WRITING SOUND LIKE ME?


In a word -- yes! We go to great lengths to understand your unique writing voice and brand style so that we can match your tone AND write in a way that resonates with your audience.

✓ 04. DO YOU USE CANNED CONTENT?

Nope! All of our content is 100% unique to our clients and is owned by them. We believe in creating custom marketing solutions for our clients to help them achieve optimal results.

✓ 05. HOW DO YOU COMMUNICATE WITH CLIENTS?

We meet with clients monthly or quarterly via Google Meet or phone, and communicate via email between sessions. All content creation is done in Google Drive.



Consulting

MARKETING CONSULTING

VIP DAY

Our consulting intensive program includes a prep call, a 2-4 hour intensive, and a 30-minute follow-up Q&A call. We also offer 30 days of unlimited email support to ensure you hit the ground running! During our intensive, we:

- #1: Analyze your current brand strategy.
- #2: Create a scalable content marketing plan.
- #3: Build and review your in depth content calendar.
- #4: Set KPIs to successfully track success.
- #5: Set up a delegation plan to ensure your strategy takes flight.
- #6: Organize a next-steps strategy.

You'll walk away with a unique-to-you marketing playbook, and clarity around how your business can successfully pursue a marketing strategy in the coming year -- without having the strategy rely 100% on your participation to be successful.

YOUR INVESTMENT

\$2,499



Service Offerings

DONE FOR YOU MARKETING

ALL PACKAGES INCLUDE

All of our services begin with a one time marketing plan and audit. This service includes:

- Analyze your brand strategy and set new goals.
- Audit your website for usability and SEO.
- Audit your social media channels to maximize content sharing.
- Audit your email marketing and lead generation pieces for clear and conversion-focused communication.
- Review current marketing collateral.
- Define KPIs.
- Create a tailored marketing plan.

This 4-week planning session helps us lay a strong foundation for your ongoing marketing efforts. It also gives us time to get to know you, your firm, your voice, and your ideal audience.

YOUR INVESTMENT

\$1,000

Continued

BASECAMP

PACKAGE INCLUDES

This package focuses on building you a strong content library through ongoing blog content writing, keyword research, and quarterly consulting sessions.

YOUR INVESTMENT

\$1500/month

RIDGELINE

PACKAGE INCLUDES

Content creation and distribution are the focuses of this package. Ridgeline clients receive blog content writing, monthly newsletter creation, and social media management, as well as quarterly consulting calls.

YOUR INVESTMENT

\$2,500/month

SUMMIT

PACKAGE INCLUDES

Looking for a fully outsourced solution? Our Summit package includes everything from Ridgeline plus webinar and seminar management, website copy assistance, and more.

YOUR INVESTMENT

\$3,500/month



LET'S WORK TOGETHER

Add On Service

WEBSITE AUDIT & COPYWRITING IN A WEEK

PACKAGE INCLUDES

Build your online presence with this one-time package. This package is suited both for ongoing service clients and financial planners who need help with website copywriting as a one-time project.

We take the core elements of your brand and infuse it into streamlined, beautiful copy that will impress prospects and repeat visitors alike. Your copy should attract, delight, and inspire ideal prospects to engage with your brand, all while clearly articulating your company's mission and values.

Together, we will explore:

- Your "why"
 - Your ideal audience
 - Your services
- The tone you want to use
- How you want your clients to feel when working with you
- And so much more!

We tackle the website pages that provide the most impact. You want your top-performing pages to have a cohesive and compelling message, which is why we focus on the following pages:

- Start Here or About
- Home Page
- Services/Our Process
- Team
- Contact
- Blog or Resources

-With us, stunning custom copy is just step 1. We also provide a comprehensive SEO and Google Analytics audit, along with actionable recommendations to improve the ranking and usability of your site and holistic online presence long-term.

YOUR INVESTMENT

\$2,750