

ADVISOR WORKS PRICING

STEP 1 - PRACTICE ADVANTAGE MEMBERSHIP

\$350 one time setup + \$99/month



All advisors wishing to work with Advisor Works must enroll in the Advisor Works Practice Advantage membership. All specific programs purchased afterward have their own investment and expense structure. (Available at the bottom of this page)

Your Practice Advantage Membership Includes:

- Initial Consultation
- Advisor Works Best Practices Monthly Newsletter
- 1 Hour of Marketing Consulting or Marketing Services Done For You per Month

STEP 2 – ACCESS ADVISOR WORKS “DONE FOR YOU” SERVICES

If a project is selected from the current Advisor Works offerings, the following costs will apply:



Personal Client Newsletters: \$200 per month, plus pass through expenses: eg. postage and envelopes and printing if the advisor chooses to use regular post (approximately \$1.50 per client if traditional mail is used, lower pass through expenses for email delivery of newsletters).



90 Day Call Rotation: \$1,250 per quarter up to 150 clients, \$4 per client over 150, plus pass through expenses (which are expected to be minimal).



Holiday, Birthday, Anniversary and other celebratory cards: \$450 per event, plus pass through expenses: eg. Cost of cards, postage (approximately \$2.50 per client if traditional mail is used, minimal pass through expenses for email delivery).



Client Events: \$2,500 plus pass through expenses: eg. Room rental, refreshments, industry/topic experts, etc. (approximately \$500 plus cost of any expert speakers). Require 60 days notice.



Intimate Client Dinners: \$1,500 plus pass through expenses: eg. Cost of invitations, meal expense, etc. (approximately \$1,400). Require 60 days notice.



Seminars: \$2,500 plus pass through expenses: eg. Cost of invitations, room rental, refreshments and snacks, gift give aways (approximately \$500). Requires 60 days notice.



Buying or Selling a Practice: From \$2,500-\$3,500 plus pass through expenses.



Guest Speaking: From \$1,000 plus pass through expenses. See Website for topics.



Disclosure 2016: \$2,000 includes full practice analysis, action plan, training and presentation materials

Contact Robert Friday 416-910-7904 or rfriday@advisorworks.ca to get started today