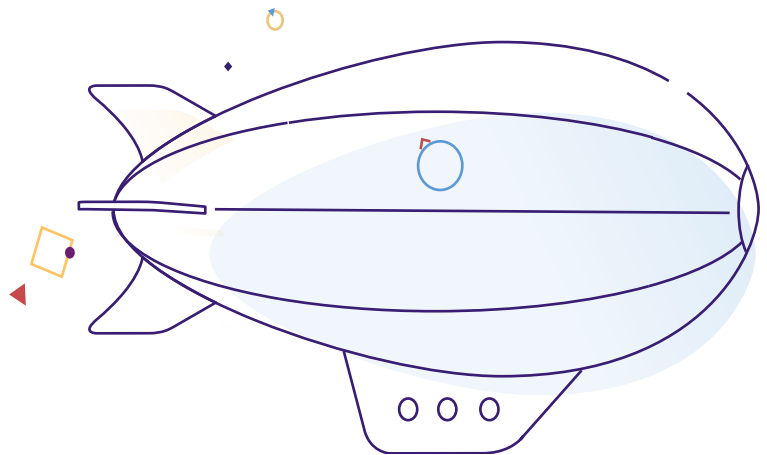


Be Active in Your Community

Use this guide to assist in reaching new clients and engaging with existing clients through your community presence.



Research suggests that prospective and existing clients want to work with companies that feel a sense of social responsibility and community involvement and have a larger purpose that goes beyond what they do day-to-day. In this guide, you'll learn why it's essential to connect with people in your community and have a strong community presence.

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Engage with Purpose

When was the last time you and your team joined together around a cause, served the community or just congratulated a local team on a successful season? Having a community presence is about engaging with the people in your community and being deliberate about serving your neighbors. Community presence comes in many forms including talking to people on social media, volunteering at local events, making charitable contributions or having relationships with people who align with your values.

50%

of employees believe their employer should connect them with opportunities for charitable engagement.¹

A strong focus on community engagement can be a key driver to growth in the overall success of a company. Companies often uphold the four p's as part of their business strategy – product, price, placement and promotion. A successful company also considers a fifth p: purpose. Without purpose, often found within your local community, you may overlook an important opportunity to grow your business and strengthen your team by positively impacting your community as a whole.

Allowing yourself and your team to focus on making an impact within the community is a tremendous way to give your employees something of great purpose and value, outside of the office.

For your presence to be meaningful and valuable to your community, you must take action and demonstrate that you really care about your commitment to a community. Talk is cheap, but your actions can speak volumes.

Building Personal Connections in Community

Along with fulfilling a higher purpose, establishing your community presence is a powerful way to create a client base that trusts you. With all the busyness that comes with growing a company and serving clients well, companies often forget about engaging with their local community base. Community presence not only helps you engage with people in your community, but helps build a strong foundation your business and your team can grow on. A larger presence in the community dramatically increases your firm's positive brand influence and strengthens awareness for you and your team in the community.

If you are looking for more ways to get involved, or you're looking for another community to be a part of, here are a few simple ideas:

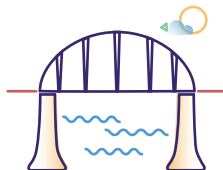
City Government



Local Sports Teams



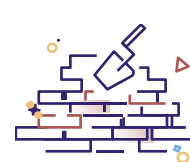
Your Neighborhood



Religious Organizations

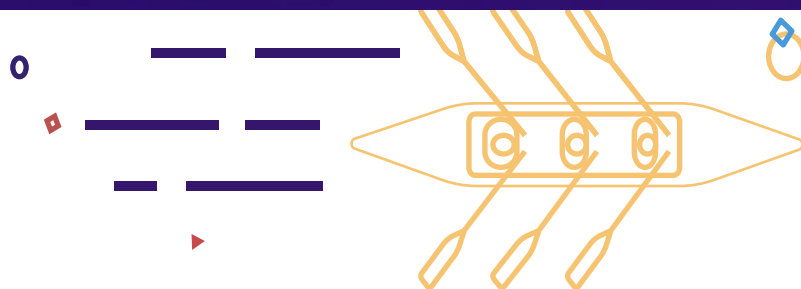


Volunteering



¹https://www.globalgiving.org/learn/listicle/5-creative-ways-companies-can-intwine-philanthropy-into-the-everyday/?rf=learn_csrfacts

Improving Your Community Presence



Improving your community presence won't happen overnight. It may take time for some of your efforts to pay off, but the more authentic engagement and effort you put into getting to know your community and creating positive interactions with them, the better. Serve the people in your community and build strong relationships with people you already know.

Four Ways to Serve Your Community

- Fundraise or sell items to raise money for a good cause
- Collect, prepare, distribute or serve food
- Mentor youth
- Use your professional skills to teach or tutor community members

Your Positive Brand Presence

When you build your brand presence, you're making it easier for potential clients to recognize your firm outside of their need for your services. By building your brand affinity you make future opportunities for business easier with your name recognition.

Improving your brand presence is easier than you might think. It's all about being a good neighbor and an active participant in the regular activities you may already attend.

One example of building a brand presence is companies who sponsor local kids' sports teams. Sponsors have their names associated with the team and have their branding on display at local games. Go all out and don't just go for the shirts. Get some water bottles, bags or gear. This is a great opportunity to make a positive impact and your actions reflect not only your commitment to the team, but how you may approach your business.

There are both in-person and online options you can use to connect with your community.

Keep Your Engagement Authentic

Ensure the organizations and the connections you make align with your company's core values and purpose, and are an authentic choice for you and your employees.

Avoid Polarizing Situations

It may seem obvious but avoiding politics or timely events where there is always another side helps ensure your impact is always positive.

In-Person Brand Opportunities

- Take one work day to volunteer as a company at a non-profit organization.
- Financially support local sports teams.
- Participate in community activities.
- Sponsor charity events.

Online Brand Opportunities

- Join community forums as a local business.
- Keep up local events on social media.
- Sponsor or help write newsletters or other online publications.
- Invite local news outlets to any community events you host.

Building Community Through Social Media

In the past, the only way to grow community was face-to-face and a handshake, but over the last several years we've seen an enormous shift to online. Building community and engaging with people through social media is one effective tactic to help more people get to know your company.

There are countless ways to engage your community and followers online. Create content you know your community will appreciate, engage with your audience, join groups, share content, tag/hashtag and so many more. Understanding your firm's goals in community and transitioning them online can dramatically grow the community you influence.

Engage in Your Followers' Lives

If a client was in the office and told you about their child's sports team winning a championship or graduating from high school, you most likely would congratulate them and wish them well. You can do the same on social media. Congratulate graduates and show your support for local sports teams.

Join an Online Group

What are your hobbies – winemaking, antique cars, cooking? There are hundreds of social media groups in your area where you can engage with people who share your interests. These are ready-made groups where all you have to do is join and get to know others in the group.

Share Third-Party Content

Did you find an article for a news outlet helpful? Share it on your social media so your followers can see and benefit from it too. Make sure any content you share is relevant and helpful. As a thought leader, share the information you think would be beneficial for your clients.

Create Custom Content

MarketingCentral has plenty of social media automations that help you post engaging content on your social channels. It's also important that you create your own custom content that you know your fellow community members will love. Think about what they want to see on social media and if it will also fit in with your values and purpose.

Using Social Media #hashtags

Placing a # sign in front of a word shares your post to anyone searching that word on social media. Try searching #yourcity.

@tagging in Social Media

Typing an @ and the proper social handle (name) of a friend or business shares your post with them. This is a great way to recognize or encourage people in your community.

MarketingCentral Quarterly Plan

The Cetera Advisor Marketing team compiles a step-by-step quarterly marketing guide called the Marketing Plan containing a large collection of compliance-approved email content for you to send to any number of your client and prospect segments. Set up a time to walk through the quarterly plan with the Marketing group.



Measuring Community Presence

The goals for improving your community presence are likely going to be a little different than usual marketing goals. Because community presence is about creating a strong foundation and actively being part of your community, success will look more like having increased trust from local people, being associated with certain community events and having a more personal marketing message for those people who are in your community. We recommend setting goals like:

- Promote one community event on social media per month.
- Improve existing relationships with people in your community.
- Participate or engage with local monthly events.
- Create a sense of community with the people in your company.

Along with these goals and metrics for community presence success, there are other measurements of success you can track to determine what kind of influence you're having on your company. Ask yourselves these questions:

1. Are people from our community engaging with us on social media? (Engagements like commenting, liking, sharing)
2. Do we have better relationships with the people in our community than we used to?
3. Do clients show more brand loyalty?
4. Is our brand spread by word-of-mouth?
5. Are you getting more potential clients from your community?

Keep Your Company Accountable

Want to make volunteering and bettering your community a priority? As you're creating your quarterly marketing plan, also plan days when you can all volunteer as a company.

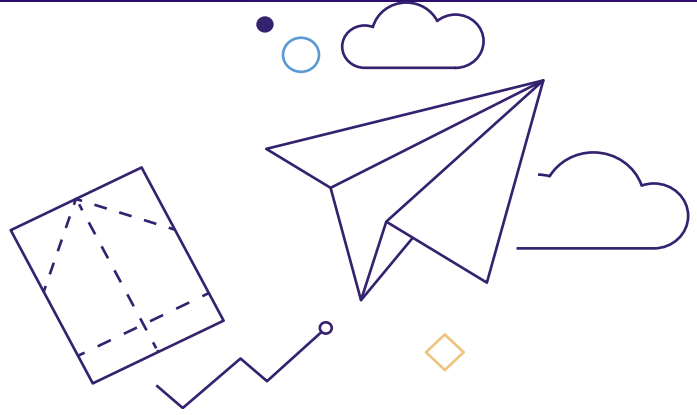
Community Presence Compliance Safeguards

Staying compliant is vital to protect you and your company's reputations. Take care to avoid language on your website that sounds promissory or misleading. Use clear, accessible language on every page. These quick steps can help you establish a system of checks within your firm.

5 Simple Steps to Safeguard Your Firm

1. Learn about the risks: talk with your legal or compliance department. Review Cetera's social media policies and take the Social Media training course in the SmartWorks Learning Center.
2. Get clear guidelines on how and where you should use specific language. What kind of language do you need to avoid? Any disclaimers you need? And where do they need to be?
3. Establish guidelines for reviewing materials and set up approval hierarchies. Make sure your whole team is aware of these protocols.
4. Whether it's you personally, your compliance officer, or a trusted vendor, make sure that someone is watching for errors.
5. If you are considering running for a government office be sure to review regulatory requirements related to holding a position like this.

Growth360: Community Presence Overview



Becoming a pillar of the community not only improves your life and the lives of your teams, but it will also help more people trust you and trust you with their finances. MarketingCentral, Cetera's digital marketing platform, can help support your community presence efforts.

Use the stages below to assess where you are today and find new opportunities for growth.

Visible

Success at the first level is all about making sure you identify and have a clear understanding of what your larger, socially responsible purpose is. Often, your community or the community you want to be a part of works with your larger purpose. At this level, you should also build your brand presence or improve on the brand presence you already have to ensure you have name recognition, both within your community and outside of it.

Active

Success at the second level is participating in community events. You can choose to go to local events, volunteer during working hours or on your personal time, as long as you are participating in some way. An easy way to ensure participation is to set regular goals to measure community presence. Participation can also include engaging with your community through your social platforms.

Optimized

The third level is about the impact the company presence has on the community. This can be hard to measure in usual marketing metrics. One way to positively impact the community is through investing not just time, but also funds, into organizations that align with your community's values. Another way to understand your company's impact is through your online presence. If people are positively engaging with the community content you're posting, you can assume your company is a positive influence.

MarketingCentral by Cetera

Build a strategy for growth with MarketingCentral, a powerful suite of tools built exclusively for you by the Cetera Marketing team. MarketingCentral is a comprehensive multi-channel platform with pre-approved email templates, social media content, downloadable event kits, presentations and so much more that you can fully customize to meet your business and client needs. Take the guesswork out of marketing and focus on growing your business.



Learn more at <https://fmgsuite.com/marketingcentral/experience/cetera-resources/>



QuickStart Guide

Get up and running with this step-by-step guide to MarketingCentral.



Interactive Webinars

Register for an interactive webinar to learn more about the MarketingCentral tools and get assistance with any questions.



Marketing Strategy & Best Practices

Put together a solid client and prospect outreach strategy designed to get results with the help of this straightforward guide.



MarketingCentral Automations

Explore opportunities to automate marketing communications across email, social and print.



Growth Guides

Drive leads and increase prospect conversion rate with these Client Prospecting and Conversion Guides.



Events Guide

Leverage MarketingCentral and these tips to plan, manage and promote your next client or prospect event.



2021 Marketing Calendar Template

Plan the next year of marketing content and strategy with this calendar template.



Required Record Retention

MarketingCentral is an approved record retention tool.



Using MarketingCentral as a Team

Use these tips to personalize a profile if you are using MarketingCentral as an ensemble team or program.

Additional Community Presence Resources

[Growth Guides](#)

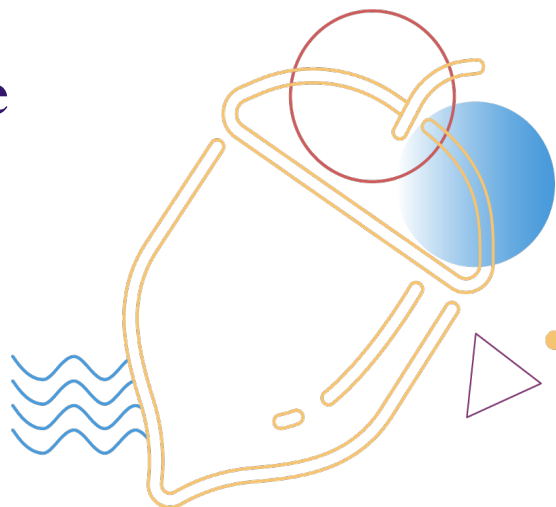
[Social Media Best Practices](#)

[2021 Marketing Calendar Template](#)

[Events Guides](#)

[MarketingCentral Quarterly/Yearly Plan](#)

[Using MarketingCentral as a Team](#)



'Cetera Financial Group' refers to the network of independent retail firms encompassing, among others, Cetera Advisors LLC, Cetera Advisor Networks LLC, Cetera Investment Services LLC (marketed as Cetera Financial Institutions or Cetera Investors), Cetera Financial Specialists LLC, and First Allied Securities, Inc. All firms are members FINRA/SIPC. Located at 200 N. Pacific Coast Highway, Suite 1200, El Segundo, CA 90245-5670.

Individuals affiliated with Cetera firms are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.