

Using Health Care Directive Registries as a Marketing Strategy

We're all looking for new and professional ways to distinguish our firm from the competitors in our field, and to generate the top-of-mind awareness that keeps clients coming back to us for additional help and support. One of the best ways to do this is through third-party credibility. Couple this with the fact that marketing experts suggest that you have at least 9 "touches" annually with your clients. Outside parties can help with these touches; thereby adding that important third-party credibility. Here's an example.

Last issue we talked about how to evaluate advance directive registries. In this issue, I'll use the registry as an example of how third parties can enhance and reinforce your current marketing. Some registries specialize in working with wealth management professionals, and these will afford you the maximum benefits. By way of specific example, I've summarized below the marketing benefits and reinforcements that one registry, DocuBank, provides for members of our legal association – the National Network of Estate Planning Attorneys (NNEPA) – if we choose to enroll clients in their program.

As you read this, consider how this or a similar registry, or a different type of third party service entirely, could leverage your firm's marketing. DocuBank's third-party marketing offerings include:

1. Personalized emergency **wallet cards feature your name** and contact information. This free advertising is an excellent client referral tool. (Members of NNEPA have actually gained new clients through having their names on clients' cards.) The card can also function as a "calling card" with doctors (potential clients), when clients present their cards or use them to find your phone number. DocuBank keeps your name affiliated with your clients for as long as the clients remain members of the registry.
2. DocuBank's client correspondence **mentions you by name** and reminds clients to inform you of life changes that could affect their planning. They provide multiple "touches" over the year based on a client's membership cycle.

3. Clients can elect to have DocuBank inform loved ones of their registration – and DocuBank again shares the name and phone number of the advisor who provided this protection.
4. You can sign up for their "provider finder" service, which gives interested visitors to DocuBank's website the names of advisors in their area who provide the registry to their clients.
5. Clients receive renewal discounts based on their relationship with the providing advisor. DocuBank also offers you the opportunity to renew clients' registration annually, with reinforcing marketing communications sent every year.
6. DocuBank will send you a monthly report of changes in your clients' addresses and phone numbers.

That's just one example of using inexpensive outside services to provide third-party credibility and ongoing marketing contacts. You can probably think of others!



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