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# Values-Based Quality of Life™ Newsletter
# WHITE PAPER

Bachrach & Associates, Inc.'s (BAI's) *Values-Based Quality of Life™ Newsletter* is designed to help Financial Professionals maintain client contact while communicating their interest in helping their clients achieve a higher quality of life. It is a unique "financial services" newsletter because:

- *From a Compliance perspective*, it contains absolutely **no** recommendations of any kind that are subject to regulatory review; and
- *From a Marketing perspective,* it presents client-centric information that is not date-sensitive and in a manner that provides:
    - a high-quality client experience,
    - a significant length of exposure, and
    - a high number of exposures

Our belief is that Financial Professionals should build solutions that are consistent with their clients' *values* and *goals* so that their clients can enjoy a higher quality of life. Financial Professionals have the responsibility to communicate recommendations *directly* to their clients and in a manner that allows their clients to make informed investment decisions.

To accomplish this, it is the Financial Professional's responsibility to sift through the plethora of information that permeates the Financial Services industry in order to develop and present cogent recommendations upon which clients can take action. Conversely, traditional "financial" newsletters tend to propagate confusion by providing information and theories that the client is ill-equipped to process. That is not the case with the *Values-Based Quality of Life™ Newsletter*.

The *Values-Based Quality of Life™ Newsletter* focuses on four major areas that clients can impact in their own lives: Physical Health, Relationship Health, Inner Health and Career Health. These are the four recurring "life themes" (that cannot be delegated to others) that most people deem to be *more* important than money.[1] The *Values-Based Quality of Life™ Newsletter* is a vehicle through which Financial Professionals are able to provide outstanding articles, written by leading experts, on *non-financial* subjects that are likely to have a greater impact on clients' lives than even the best financial planning.

The result is a monthly reminder to clients that the Financial Professional they have selected is managing their financial concerns and cares about them personally as well as professionally. This reinforces the high-trust, client- centric relationship that benefits both parties and engenders an intense level of long-term loyalty. Correspondingly, the client is no longer confused by the complex financial information that other newsletters provide, and no regulatory issues are raised.

**"This is a really good newsletter, it's well done. I didn't throw it in the trash like I do with 99% of what comes in here."** –Scott P.'s client

[1] Based upon feedback received from thousands of Quality of Life Enhancer™ Exercises

To better understand the design of the *Values-Based Quality of Life*™ *Newsletter* (Newsletter), consider the following:

- The *Values-Based Quality of Life*™ *Newsletter* is produced on a monthly basis.
  - Third-party studies indicate that clients require 26-28 "touches" per year to maintain an effective relationship.
    - The Newsletter provides 12 "touches" in an extremely cost-effective way and with the following characteristics:
      - A high quality of exposure because of the nature of the articles,
      - A significant length of exposure because the Newsletter elicits a client's attention, and
      - A repetitive pattern of exposure because the Newsletter is retained over time and may be revisited by the client or shared with others.
- Each issue is demarcated by "Volume and Issue" rather than by "Date" because the contents are not date-sensitive.
  - This eliminates the obsolescence issue associated with traditional financial newsletters.
- Topics reflect the core, non-delegable interests of all clients.
  - Content and authors change each month to create fresh perspectives.
    - Articles are screened to eliminate controversial subjects or opinions.
    - Each issue is available, in advance, for Compliance review (if requested).
- Each issue contains an inspirational quote (lower left corner of front cover).
- The *Values-Based Quality of Life*™ *Newsletter* is produced on a high-quality sheet with a pleasing color palette to make it distinctive and enjoyable to read.
  - It can be ordered pre-folded without any additional cost.
    - When folded, it is designed to fit into a standard #10 envelope to reduce mailing expense and to allow the inclusion of additional documents
- The "sidebar" (on the far left side of the front cover) is customized to feature the Financial Professional and his or her firm.
  - A picture of the Financial Professional is positioned in the upper-most area of the sidebar so that it appears with the title immediately upon removal from a standard #10 envelope.
    - The Financial Professional's name and title appear immediately below the picture.
  - The sidebar can incorporate a quote from the Financial Professional or his or her firm.
  - The sidebar can incorporate the firm's logo.
  - The sidebar always incorporates the Financial Professional's contact information.
  - The sidebar can incorporate any required disclaimer (of reasonable length).
  - The sidebar can incorporate a Legal Department number to verify Compliance approval.
- The *Values-Based Quality of Life*™ *Newsletter* subtly reflects the Financial Professional's interest in the client's quality of life and reinforces the Financial Professional's assistance in managing the client's financial concerns.

**"The comments we get about the Quality of Life newsletter from our clients is very positive. One comment we get the most is, "It's the one thing I read every month." This is one reason why we have been sending out this non-financial newsletter for at least 11 years."** –Greg C.

**"An ideal prospect told my ideal client who referred me to her that she really enjoys the Quality of Life Newsletter and she hopes I don't stop sending them to her."** –Dan O.

While firms routinely permit (and even encourage) the use of birthday, anniversary and holiday greeting cards to maintain client relationships, the Values-Based Quality of Life™ Newsletter is a far more meaningful and effective way of enhancing the client relationship. It provides important information that clients can use to improve the quality of their lives.

**"I am really enjoying the newsletters, they are excellent! Your newsletters are great quality and I've been passing them along, as long as they give them back to me. They're all about physical health, relationship health, inner health and career health. Just fantastic! To me I think this is great information that people can actually use."** –Dean K's client

If you would like additional information or have any questions concerning the *Values-Based Quality of Life™ Newsletter*, please contact Anne Bachrach at (619) 255-4888. Otherwise, congratulations on selecting the finest available method of demonstrating that you truly care about your clients. Your choice reflects a belief that you share with Bachrach & Associates, Inc.: that speculative financial information should not be disseminated randomly and that it is the responsibility of Financial Professionals to discuss financial recommendations directly with their Clients to ensure that those Clients are in a position to make informed investment decisions.

Respectfully,

Bill Bachrach
President and Chief Executive Officer
http://www.billbachrach.com/order-newsletter/

**"My clients love the Values-Based Quality of Life newsletters. One client told me that he took his son out for lunch to specifically discuss an article in one of the issues and how it can impact his life. I continually get comments from my clients about how much they enjoy getting the newsletters. Every month my face is in front of them and it has helped me get even more referrals because of this."**
–Daryl M.

**"I've been using these newsletters since day one as a financial advisor and have never missed a month! I get the most positive comments from my clients about these newsletters. My clients continually say they love receiving them and I even get calls about certain articles in the newsletter. My clients love the fact they aren't business oriented and it truly helps them be a better person."** –Jack W.

**"Each month the Quality of Life newsletter is going out to our clients and prospects with a note I personally sign. This past month, two prospects sent an email within 2 days of the time it was sent. The first included a photo of her husband's "happy place". The second was a comment on a specific article. It's fun to see that our clients and prospects are reading and enjoying the newsletter, as I do."** –Louise B.

**Who gets the Values-Based Quality of Life™ Newsletter?**

- All of your Ideal Clients and your Good Clients (the people you would like to have more of and get even more referrals from).
- All of your Prospective Clients. This includes people who you would like to meet.
- All of your Subject Matter Experts (CPAs, Attorneys, Insurance, etc.) Many times, they are happy to have some newsletters left in their waiting area of their office for their clients to enjoy reading while they wait.
- Consider leaving some copies in places where you know there could be potential Ideal Clients (ex. doctor's office, dental office, ophthalmologist office, coffee shop, mortgage broker's office, real estate, etc.)
- Some Advisors have given them out instead of a business card, and found that more people call them from receiving the newsletter and not the typical business card.

**Prospective Clients should get the newsletter**

1. once per week for 8 weeks, and
2. then every month thereafter until they become a client (in which case they will receive the newsletter forever) or until they are eliminated from your "pool".

**Note**: This is why you want to have some extra newsletters each month.