Lisbeth Wiley Chapman,

Principal, Ink&Air

Ink&Air specializes in delivering clients and assets to independent financial advisory firms, mutual fund companies, broker/dealer firms, CPA firms, independent insurance agencies, and e-commerce companies offering financial products and services to the financial advisor distribution channel.

She designs and implements strategic media and web communications campaigns. Beth is skilled in client advocacy and in translating client viewpoints into trend-based news stories. She is a sought-after speaker to audiences of financial advisors on the strategies for marketing professional practices. She regularly places stories and develops interview opportunities for her clients with *The Wall Street Journal, New York Times, USA Today, Barron's* and national, regional, local, trade and professional publications, as well as broadcast outlets.
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She is the author of *"Get Media Smart! Build Your Reputation, Referrals and Revenues With Media Marketing,"* a professional development program specifically written for financial advisors, available online at www.inkair.com. Her next book "Added Value: 101 Ways to Leverage Loyalty With Your Best Clients" will cover the traditional and non-traditional techniques for marketing an investment advisory firm.

Financial Services Industry Background:
Beth has been in private practice serving as PR counsel for clients since 1991. From 1994 to 1996, she was consulting media director for Charles Schwab & Co., Inc., Institutional Division Annual Conference, responsible for developing interest on the part of the national financial media in covering what is now called Schwab Impact. Previously, Beth was Vice President, Public Relations for The Putnam Companies, Boston, helping meet corporate goals by setting the agenda on trend stories with the financial media. Beth edited the first 20 issues of *Financial Services Times*, later known as *Financial Services Week*, a national trade publication providing practice management and trend analysis for financial planners, accountants, bankers, and insurance agents.

Activities:
She served on the Strategic Planning Committee of the Massachusetts Chapter of the Financial Planning Association. She is a PR consultant to the board of PridePlanners. She served as a consultant to the Brandeis-based National Policy and Research Center for Women and Aging, responsible for media relations for their "Women and Financial Planning" Survey Report. She has served on the Board of Advisors to the Boston University Program for Financial Planning and as a Board

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The program will cover the following five areas:

1. Shaping Perceptions of Your Expertise
2. Creating a Targeted Media List that Reaches Ideal Clients
3. Developing Newsworthy Story Ideas
4. Building Long-term Media Relationships
5. Tips and Techniques for Marketing Your Web site

Homework: Your experience of this program will be greatly enhanced by spending 1/2 hour working on the following homework.

Please e-mail your answers to the following six questions by the Friday before the presentation, with your permission to use your comments during the session to: Beth_Chapman@inkair.com.

Your Name: ____

Name of your Practice: ____

Phone: ____

1. Write a short paragraph that details what you do, for whom and with what expected results, using no more than 25 words.

2. Collect five questions recently asked by clients.

3. List the top five national or local publications you think your best clients read

4. List the top five industries or professions of your top ten clients

5. List the top five trade publications you think your best clients may read and if you don't know, ask their assistants!

6. What is the most important issue for non-traditional families that will impact your clients' retirement security, either good or bad?