



**Guidance**

**for**

**Establishing Marketing Strategies**

**Initial recommendation for SDIRA marketing program development:**

* Identification of existing traditional IRA account holders for feasibility of becoming shareholders
* Implementation and communication of FMV (incorporation of a stock valuation program)
* Communication to existing shareholder on the Self-Directed IRA program
* Development of informational brochure for use in program communications
* Communication of primary message … “Long term investment of an IRA aligns to the long-term value of (hold) associated with privately held BHC/Bank stock
* Continual reminders to Self-Directed IRA account holders of the value in making consistent contributions. (Same process as communicated to existing traditional IRA account holders).
* See Library-Marketing for prepared letters and brochure examples.