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## **CEG Worldwide Introduces New Strategic Alliance Marketing Initiative**

**“SAMI” is a turnkey, customizable marketing campaign exclusively for CEG Worldwide coaching clients.**

**SAN MARTIN, CA—April 7, 2010** — CEG Worldwide, the leading coaching, consulting and research firm for elite financial advisors, has launched a marketing initiative to help advisors forge successful strategic alliances with CPAs, attorneys and high-end insurance specialists.

The new offering—the Strategic Alliance Marketing Initiative—contains a series of fully customizable, prepackaged marketing campaigns. SAMI (pronounced “*sammy*”) is reserved for graduates of CEG Worldwide’s elite advisor coaching programs and enables their alliance partners to customize their marketing with their own logos, taglines and a brief message.

### **Power of strategic alliances**

Forming strategic alliances is one of the most effective tactics that top-performing wealth managers can use to grow their businesses and distinguish themselves from their peers. CEG Worldwide’s research indicates that accountants, attorneys and high-end insurance providers are more likely than other professionals to have numerous clients in need of financial services from a trusted source.

“Many of our top financial advisor clients have asked us to help them not only create powerful alliances but also to market those alliances so they can achieve maximum exposure,” says John J. Bowen Jr., founder and CEO of CEG Worldwide. “Advisors and their professional partners are not marketing experts and do not have the time or energy to become experts in that discipline. We’re here to help.”

### **Five keys to successful alliances**

SAMI is a turnkey service that empowers advisors and their strategic partners to position their alliance

effectively, to convert new clients efficiently and to maximize their revenue potential. The SAMI program addresses the five critical components of a successful alliance-building program:

1. Gaining early wins
2. Implementing a sustained, 12-month marketing plan
3. Creating intentional “client collisions”
4. Providing full marketing support
5. Building momentum

SAMI provides support at both the infrastructure and event levels:

The *Infrastructure Campaign* provides alliance partners with a full suite of tools to position the alliance and promote its benefits to mutual clients. Offered in bronze, silver and gold packages, this offering is designed to make it easy and effective to promote the alliance over a 12-month period.

The *Event Campaign* provides alliance partners with a full suite of tools to deliver engaging client development seminars. Offered in bronze, silver and gold packages, this offering delivers tools, resources, presentation materials and marketing plans, enabling alliance partners to host two seminars a year.

“Alliance partners can choose to take our marketing plans, written copy and ideas and implement them on their own, or they can work with us to customize prepackaged materials and have us execute the plans on their behalf,” says Bowen. “Each SAMI campaign includes the option for at least 10 touch points, ensuring the greatest possible exposure.”

Visit [www.cegworldwide.com/sami](http://www.cegworldwide.com/sami) for more information about CEG Worldwide’s revolutionary new SAMI program for financial advisors, including details on what each program offers.

### **About CEG Worldwide, LLC**

CEG Worldwide is passionate about coaching financial advisors and institutions to build a Simple and Elegant Wealth Management Business<sup>SM</sup>. Using state-of-the-art research methodologies and analysis combined with proven strategies and tactics for building highly successful advisory practices, CEG Worldwide provides uniquely powerful insight into what allows elite financial advisors to thrive.

CEG Worldwide delivers fully scalable financial advisor training programs at many of the world’s largest financial institutions. The firm’s proprietary institutional strength intelligence is based upon empirical studies of more than 10,000 advisors and 14,000 high-net-worth individuals. By combining research expertise with pragmatic and proven business experience, CEG Worldwide helps institutions achieve measurable gains in productivity, retention and assets under management and provides advisors with proven business-building strategies and tactics.