

A background image showing a business meeting in progress. Several people are seated around a table, looking at documents and a laptop. One person is pointing at a laptop screen, while another is writing on a tablet. The image is overlaid with a dark blue gradient.

HARVEST FINANCIAL

Marketing Proposal



ORCHARD
FINANCIAL MARKETING

OVERVIEW



ORCHARD
FINANCIAL MARKETING

EXECUTIVE SUMMARY

Executive Summary

Harvest Financial

This proposal from Orchard Financial Marketing, led by Jared Laidlaw, outlines a proven digital marketing strategy tailored to meet Harvest Financials business goals.

We appreciate the time we've had to learn about your business, and believe our approach will drive quality leads, re-engage the database and consistently increase revenue over the following 12 months. We're confident in our ability to deliver measurable results, quickly and sustainably.

Thank you for your time and we look forward to working with you.

Jared Laidlaw
Managing Director



ABOUT ORCHARD

Vision

Deep impact.

To be the driving force in a world where financial advice is accessible, trusted, and thriving online.



Mission

Results that matter.

We partner with financial advisers to grow their practice through smart, scalable marketing systems that build trust, drive leads, and turns expertise into impact.



Purpose

There's more to it.

To help financial advisers thrive in a digital world and unlock the full potential of financial advice globally.



ORCHARD

FINANCIAL MARKETING

We're your partners in growth.

As a small family-run business, we take pride in offering a personal touch and building relationships that last. We're invested in your success and ready to help you grow your business with tailored, impactful solutions.

Jared Laidlaw

Managing Director

- Account manager for Harvest Financial
- Over a decade of experience across media buying, funnel architecture, and business ops.
- Over \$3.5 million in ad spend for financial services clients
- Helped build a digital agency to 10+ staff and a \$2M valuation as employee number one



Who We've Worked With Our Partners

We've been fortunate enough to work with many talented advisers and firms over the years.

Detailed case studies and testimonials can be found on our website.





ORCHARD
FINANCIAL MARKETING

SITUATION

Current Situation

July 2025

- Grown a lot through owners network and local referrals
- Key center of influence has been acquired, no longer able to refer or work with us
- Leadership is interested in building own brand campaigns and lead generation efforts

Challenges

- Haven't run digital advertising before
- Existing cash flow is positive, but not an endless runway to get campaigns up and running
- No in-house marketer and busy staff. No engagement need to be efficient with time

Current Situation

Goals

- Build up Harvest brand campaigns generating quality leads each week
- Quality is:
 - Correct contact details
 - Engaged during conversations
 - No disqualifying features from proceeding with KiwiSaver, Mortgage, or Insurance advice
- Grow team and regional market share
- Work with someone who can get results but also hold your hands through it

PROPOSED STRATEGY



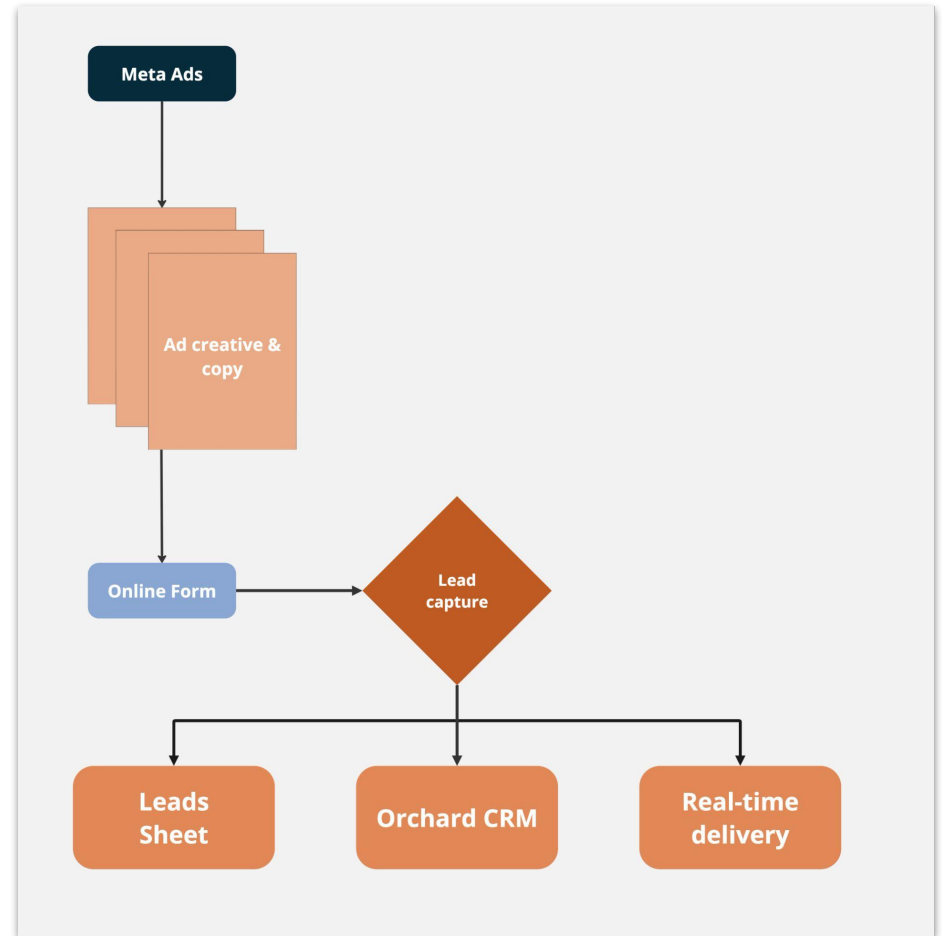
ORCHARD
FINANCIAL MARKETING

HOLISTIC STRATEGY

Option One

Starter Plan

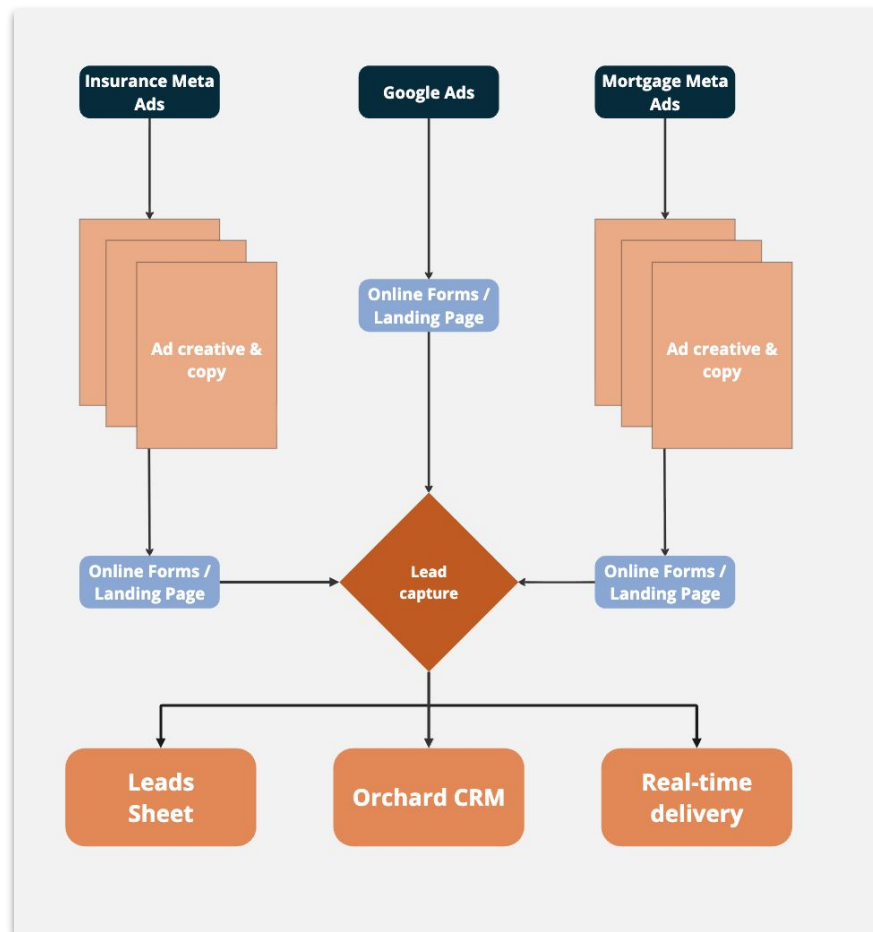
- Meta ad campaigns to drive leads
- Use lead forms and/or website
- Video creative direction
- Open to changing to static images to generate results required
- Orchard CRM and integrate into T CRM
- Reporting fortnightly



Option Two

Growth Plan

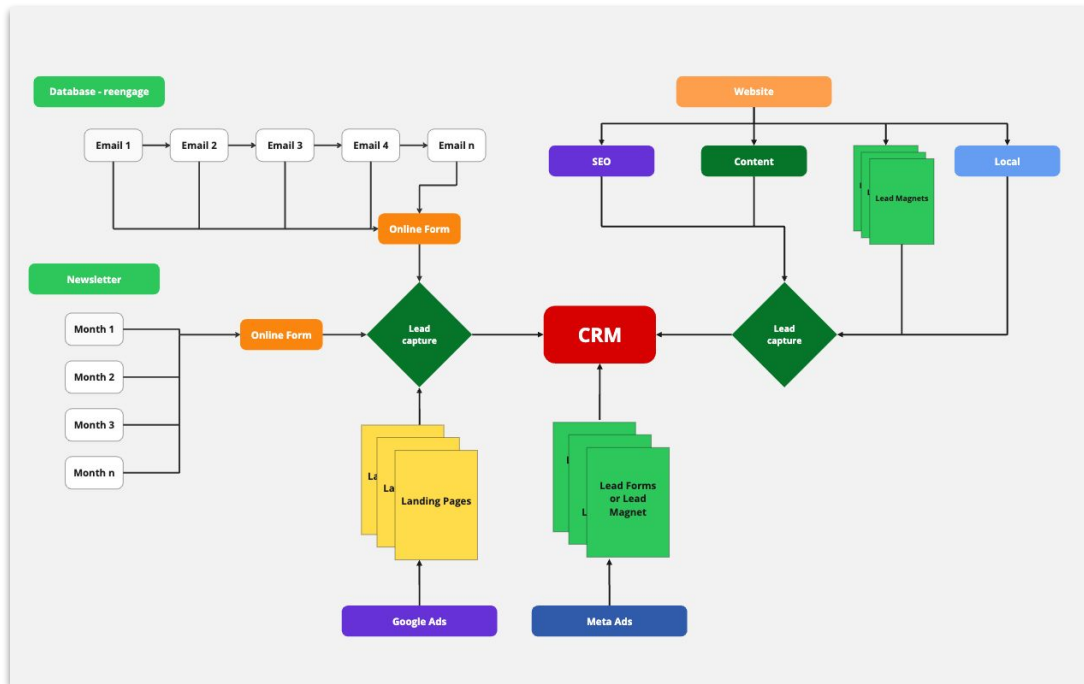
- Starter plan plus Google Ad campaigns
- Google Ads campaigns for client growth
- Landing page creation per campaign build or as needed (ad groups/keywords)
- Lead capture to sales pipeline
- Min \$1500-\$2000 ad spend for same target geographic region



Holistic Strategy

Comprehensive Plan

- Think of this like outsourcing the majority of your digital marketing needs
- Email flows
- Google + Meta campaigns
- SEO, improve website organic traffic
- Local marketing focus
- Content marketing and lead capture





ORCHARD
FINANCIAL MARKETING

MARKET ANALYSIS



Email Marketing

Opportunity

With a database of 3,000 past clients, email marketing offers a compelling, cost-efficient channel for Harvest Financial to reignite refinance conversations and cultivate referrals. By leveraging segmentation and automation, we can split into smaller groups and run targeted where needed such as refix dates drawing near, clients who may be looking to upsize or downsize.

As well as outcome driven campaigns, well-crafted, informative newsletters should be used to position the broker as a trusted advisor and encourage recipients to engage and refer. Set to a monthly cadence, these newsletters will offer a low cost touch in a frequent manner so that Harvest Financial can remain top of mind within it's database.

Google Ads

Opportunity

Within your local region there are a good number of monthly searches in the Mortgage space. Research puts the market at between 2000-5000 searches a month depending on how wide the mortgage phrase and intent net is cast.

We recommend that at least an audit and review of the previous Google Ad campaigns be held as there is definitely a need for new lead growth in Harvest Financial. Running a holistic Google Ads strategy seems to be the lowest hanging fruit in this case and utilising the data and spend history from the current Google Ads account puts this in a great position to succeed.

We are confident in our channel abilities so an audit would highlight whether the previous campaigns have any merit being turned off, or whether they were incorrectly applied in the past.



Website, Meta, and more

Opportunity

We'd be taking the competition on head first.

Our Comprehensive Package weaves together email marketing, Meta and Google lead generation, blog-driven content, website SEO, and local marketing into a unified engine for growth. This integrated framework ensures every touchpoint, from ads to search to inbox, delivers consistent messaging, builds trust, and guides prospects toward action.

This approach is about strategic orchestration, giving Harvest Financial maximum visibility, authority, and referral potential across every digital frontier, and turning interested browsers into engaged clients.



ORCHARD
FINANCIAL MARKETING

TIMELINE



Project Timeline

12 Months

Below is an overview of the proposed activity timeline. Emphasis is placed on getting leads into the pipeline within 2-3 weeks of launch. The Blue indicates the Starter plan, Orange is Growth, and Darker Orange is Comprehensive.

[illegible]

Project Timeline

Key Details

- Digital Strategy Workshop (DSW) to kick things off - 2-4 hours
- Campaigns live within 2-3 weeks generating new quality leads
- Depending on plan selected work occurs during a period indicated but doesn't represent 'live' dates
- Reporting is fortnightly
- Lead sheet or Orchard CRM used for lead tracking
- 3 month right of review (details further down)
- 12 month contract
- Harvest Financial owns all assets that they would be reasonably expected to own.
I.e. all ad accounts, landing pages, lead magnets, ad creative, emails etc.
- Ad spend is to come off of a credit card owned and managed by Harvest Financial

INVESTMENT & ROI

INVESTMENT OPTIONS

Investment Options

Starter	Growth	Comprehensive
• \$1,500/month • \$1,500 set-up fee • One of Mortgage or Insurance Meta campaigns • Landing Page creation • Orchard CRM • Tracking Management • Reporting	• \$2,500/month • \$2,000 set-up fee • Mortgage Meta campaigns • Insurance Meta campaigns • Landing Page creation • Orchard CRM • Tracking Management • Reporting	• \$6,500/month • \$4,000 set-up fee • Google Ads campaigns • Mortgage Meta campaigns • Insurance Meta campaigns • SEO & AEO • Email nurture sequence & segmentation • Landing Page creation • Orchard CRM • Tracking Management • Reporting
Ad spend range \$1,500-\$10,000	Ad spend range \$3,000-\$10,000	Ad spend range \$5,000-\$20,000



ORCHARD
FINANCIAL MARKETING

DETAILS



ORCHARD
FINANCIAL MARKETING

YOUR COMMITMENT

Your Commitment

We Need You To

- Attend Digital Strategy Workshop (DSW)
- Grant appropriate access in a timely manner
- Review and approve ad copy/creative direction where needed
- Call the leads
- Follow up with leads
- Provide accurate sales feedback
- Communicate with Orchard on activity and business performance



ORCHARD
FINANCIAL MARKETING

CONTRACT

Contract

Initial details

- 3 month right of review
 - after 3 months both parties can review the engagement
 - if either party is not meeting their part of the agreement, the contract can be ended
- 12 month contract
 - the term of this strategy is 12 months including the 3 month right of review period
 - after this period, both parties have the option to negotiate further terms
 - a 50% buy-out fee is payable if the client wishes to terminate the contract prematurely. The fee is calculated on the remaining period of the contract.

Next Steps

Take the time to review this document, work through the ROI model to find what works for you, and then regroup for further questions and a decision.

Best,

Jared Laidlaw

Managing Director

