

GUIDE TO WRITING A PRESS RELEASE FOR ADVISORS

WHAT IS A PRESS RELEASE?

It's an announcement that a firm puts out to news outlets and beyond. Other ways to describe a press release include a "press statement," a "news release," or even a "media release."

WHAT SHOULD YOU WRITE A PRESS RELEASE ABOUT?

- Big achievements, either personal or for the company as a whole. Examples include:
 - New designations
 - Awards
 - Recognition from your parent company
 - Recognition from an industry organization (i.e. NAIFA or MDRT)
- Big changes in your company. Examples include:
 - New staff member
 - Acquisition of another firm
 - Merger or succession
 - Product or service launches
 - Rebranding
- Emotional connection or data-sharing opportunities
- Significant community impacts (i.e. a grant for a non-profit organization)
- Events or grand openings

KEY RULES TO FOLLOW WHEN WRITING A PRESS RELEASE

- Make sure your spelling and grammar are on point.
- Keep it short – no more than a page following the correct format.
- Don't include graphics or imagery – most outlets won't use them.

AFTER YOUR RELEASE IS WRITTEN AND APPROVED BY YOUR COMPLIANCE DEPARTMENT, WHAT'S NEXT?

- Publishing to newswires and industry media outlets (Pro-tip: use a service like Cision or EIN Newswire)
- Distributing to local, reputable outlets via media connections
- Put it on your website
- Share it on social media (great social proof!)
- Consider distributing to clients, prospects and COIs via email marketing if it makes sense

7 KEY INDICATORS OF A GOOD PRESS RELEASE

Look at the next page to see these leveraged in a best-practice press release format.

1. A strong, compelling headline that summarizes what you're sharing
2. An appropriate media contact so that if a journalist or prospect wants to reach out to your firm, they reach the right person to keep the ball moving
3. Your location and the date
4. A solid opening paragraph that answers the 5 W's
5. A quote from someone relevant to your release – whether that's your founder, an influential person at your local or home office, or another relevant person
6. A boilerplate paragraph to describe your firm that includes your website address - typically this is the same in every release
7. A triple pound-sign at the end, to let journalists know that your release has ended

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FOR IMMEDIATE RELEASE

THIS IS A COMPELLING HEADLINE SUMMARIZING THE NEWS
This is a Sub-Headline That Gives Additional Details as Necessary

Dallas, Texas, May 2021 – This is where your first paragraph starts. You should summarize everything that you want someone to know if they don't read any further in this paragraph, including why what you're sharing is important or newsworthy. Be sure to answer the five W's here.

"This is a quote from someone relevant to your story," John Smith, Founder of DBA Financial, said. "This is the continuation of the quote text."

Follow up the quote with an additional paragraph of relevant information for your release. You can elaborate on why what you're sharing is important or newsworthy, and how it might impact your clients or business. Additionally, if you're writing about a particular award or achievement, this is a good place to provide some relevant background information. You can follow up with a third paragraph as necessary, but be cautious about making your release too long.

Finally, end with a summary paragraph that talks about the firm as a whole, from a 30,000 foot overview. This is also known as boilerplate language, and should include some basics about how long you've been in business, what you specialize in, and who you primarily work with. Typically, this paragraph will be the same or similar across all of your press releases. For more information about your company, be sure to include your web address:
www.DBAFinancial.com.

John Smith is an agent with ABC Insurance Company. The rest of this paragraph is your required compliance disclosure language, as supplied by your broker or parent company. It can be as long or as short as necessary.

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