



Nov. 5, 2021 | IFG Board meeting

MDA Insurance + MDA Services marketing Highlights

A. Printed *Checkup* newsletter expansion:

We used to do four issues per year, each issue combined with MDA Insurance and MDA Services. This is now segmented into six issues.

Frequency:

- MDA Insurance: January, May and September.
- MDA Services: March, July and November.

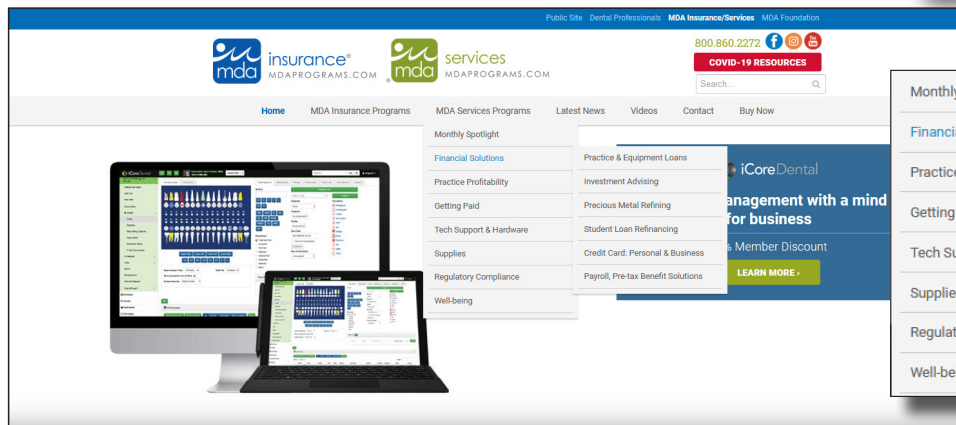
Why the expansion and separation:

- Bandwidth to explain our offerings:
 - 29 MDA-endorsed vendors (*see next pg.*)
 - 38 MDA Insurance products.
- Ability to cross-sell.
- Opportunity for members to have face time with directors, committee, and board chairs.

B. Website content restructuring:

We are revamping our [website](#) to be more member-centric; pain points/what they need. With the addition of several new MDA Services vendors, great opportunity to restructure the website. MDA Insurance undergoing similar reconstruction.

- Navigation from member perspective; front-end needs.
- Web banners and expanded CTA.



Monthly Spotlight	
Financial Solutions	Practice & Equipment Loans
Practice Profitability	Investment Advising
Getting Paid	Precious Metal Refining
Tech Support & Hardware	Student Loan Refinancing
Supplies	Credit Card: Personal & Business
Regulatory Compliance	Payroll, Pre-tax Benefit Solutions
Well-being	

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