Instructions for Marketing / Advertising Requests

Please follow the below steps when filling out the next page for your marketing needs!

Step #1:

Please check with your branch manager to make sure that they approve this request. If they do, please have them sign the request form. All requests from non-branch managers will not be blessed until signed by the branch manager. Branch managers, please remember to not exceed your annual marketing budget!

Step #2:

Fill out the attached form and attach any/all information for us to make a management decision and email to LPOmarketing@flanaganstatebank.com

Step #3:

Once you email the form and information, our marketing review team which includes, Bob Anderson, Rebecca Moorehead, Toni Pierce, Justin Yahnig, and Josh Heinrich will review the request. Once approved both your assigned sales manager and Bob Anderson will sign off on the form. In addition, Rebecca Moorehead will reduce from the branch annual budget the cost for the marketing requested (I/A).

Step #4:

Your sales manager will then email the person requesting the marketing request that your request has been approved by management and has been sent for compliance review (Sent to Mandolyn/Sarah behind the scenes).

Step #5:

After we have received approval from the compliance review. Mandolyn or Sarah will sign the request form acknowledging the compliance blessing and email the form to the requestor and the sales manager.

Step #6:

If the requestor needs to work with Mandolyn on a flyer, or other blessed item, or media they may proceed directly with Mandolyn.

Step #7 – Up Front Payment Required:

If there is an up-front invoice cost that must be paid to proceed, the branch manager simply will email the signed / approved form to JulieBetts@flanaganstatebank.com for payment.

Step #8 – Expense Report Reimbursement Required:

If the cost was paid up-front by the branch manager, please send a "separate" monthly marketing expense report to LPOmarketing@flanaganstatebank.com

Please include your approved marketing forms moving forward for each expense being reimbursed. Only monthly marketing expenses should be sent to this email. Rebecca Moorehead or Bob Anderson will then track the expense and email Julie Betts for the reimbursement to be made. All other expense items can be sent on an additional expense report directly to Julie Betts if not a "recurring bill" by nature. Recurring bills should be directly set up and sent to the bank for payment whenever possible. Please see your sales manager for further questions in that regard if you have any.