



## Marketing Approval Form

This form is for Branch Managers to use. This form should be used when a marketing approval is needed for a branch. **Email completed form and any attachments to:** [LPOMarketing@flanaganstatebank.com](mailto:LPOMarketing@flanaganstatebank.com)

Branch: \_\_\_\_\_ Branch # \_\_\_\_\_ Date \_\_\_\_\_

Branch Manager: \_\_\_\_\_ LO Submitting: \_\_\_\_\_

Submission Type: ☐ preliminary idea or concept/exploration of funds available

☐ Need Approval to proceed with marketing

Please note: if working on a prelim concept, you will need to re-submit when the plan is complete, and all known factors are present to allow our department to provide firm approval to proceed. **Do not proceed without this!**

Marketing to be approved: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Please include the following as applicable. Check what you have included!

☐ Designs of the marketing (if billboard, present graphics of what will be on signs, flyers, etc. Just need basic concepts as our marketing department will fine tune the details)

☐ Digital Marketing – samples and concepts

☐ Contracts – if needing execution, the contracts should be signed by Bank Management for accounting and record keeping purposes

☐ Promotional Material – send in what you have that will explain the marketing. This may be flyers or emails from the vendor providing a service.

☐ Invoices or Estimates of Costs – these need to be as clear as possible. If there is no cost to the marketing, then check here: ☐ No Cost Marketing

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This form will be sent back to you noting approval or denial of your request. This section is for Management use only.

☐ Concept is pre-approved – will require full details for budget approval and compliance approval

\_\_\_\_\_  
Sales Manager Signature (allowed to proceed)

\_\_\_\_\_  
Date

☐ Marketing is approved, and branch can proceed with plan

☐ Marketing is not approved. Reason is: \_\_\_\_\_

Manager Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Compliance Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Budget \$ Max: \_\_\_\_\_