



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

Branch: _____ Branch # _____ Date _____

Branch Manager: _____ LO Submitting: _____

- Submission Type:
- ☐ Updating current Marketing – Marketing assistance only is requested (budget info still may be needed!)
 - ☐ Need Budget Approval & Marketing Assistance to proceed with marketing
 - ☐ Need Budget Approval Only
 - ☐ Custom Flyer request

Please note: if working on a concept, you will need to submit a complete plan with all known factors present to allow management to provide firm approval to proceed. **Do not proceed without this!**

Marketing to be approved: _____

Date project needed by: _____ (Marketing may adjust so leave plenty of time)

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

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

Step #1 – Sales Manager Approval

- ☐ Concept is pre-approved – will require full details for budget approval and compliance approval
- ☐ Marketing is not approved. Reason is: _____

Sales Manager Signature (allowed to proceed)

Date



Step #2 – Budget Approval

- ☐ Marketing plan is approved for budget ☐ Marketing Plan is NOT approved for budget
- ☐ Budget approval is not needed for request

Budget decision by: Signature: _____ Date: _____

Budget \$ Max: _____

Step #3 – Marketing Team

- Marketing Team accepts order on: _____
- Estimated date of completion: _____ (includes a final compliance review and draft approvals as needed)

Marketing Acceptance Signature: _____

Form to be returned to the submitting Sales Manager to provide to LO at this stage.

Step #4 – Compliance Review

- ☐ Marketing Plan is approved for Compliance Review
- ☐ Marketing Plan is NOT approved. Reason: _____

Compliance Signature: _____ Date: _____

Return to Sales Manager for notification of completion of project.

Please retain this fully completed form as your confirmation of your Marketing Project. If further details or information is needed, the Marketing Team will contact you. All 4 sections must be completed for this request to be considered approved. The only exception to this is if budget approval is not needed.