

# Chapter 6: Local & Community Marketing

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## Networking Events & Your QR Code

In-person networking remains one of the most effective ways to build trust and generate leads. Your QR code is your secret weapon at every event.<sup>11</sup>

- Print your QR code on your business card, name badge, and any handouts
- At networking events, lead with your story and the value you provide — not a sales pitch
- Follow up with every new contact within 48 hours via email or text

## Chamber of Commerce & BNI Groups

Join your local Chamber of Commerce and a BNI (Business Network International) chapter. These organizations give you:

- Weekly or monthly networking opportunities with other business professionals
- Referral partnerships with members who serve similar clients
- Credibility and community visibility
- Speaking opportunities to educate members about life insurance

## Community Sponsorships & Local Events

Sponsor local events, sports teams, charity runs, or school functions. Even small sponsorships (\$100-500) can generate significant visibility and goodwill:

- Your name and business on event materials
- A booth or table where you can share your QR code and information
- Social media content opportunities (photos at events, community involvement)

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<sup>11</sup>Marketing Ideas for Insurance Agents 2026 — <https://www.levitate.ai/blog-posts/marketing-ideas-to-become-a-successful-insurance-agent-in-2026>

# Strategic Partnerships

Partner with professionals who serve the same clients you want to reach:

Partner Type	Why They're Valuable	How to Approach
Mortgage Brokers	Every homebuyer needs life insurance to protect their investment	Offer to cross-refer clients; provide quick quotes for their buyers
Real Estate Agents	Homebuyers are in a protection mindset	Offer co-branded educational content; attend open houses
Financial Planners	Life insurance is part of comprehensive financial planning	Position yourself as their go-to life insurance specialist
HR Professionals	Employees often need supplemental coverage beyond group plans	Offer free lunch-and-learns for their teams
CPAs / Tax Preparers	Tax season triggers financial planning conversations	Provide estate planning education materials they can share

# Leave-Behind Strategy

Always bring materials when meeting potential clients or partners:

- Business cards with QR code (always carry at least 20)
- One-page flyer highlighting Ethos key benefits (10-min app, no medical exam, free estate planning)
- A short info card about living benefits — this is a powerful conversation starter

# Educational Events

Host or co-host educational events to position yourself as an expert:

- "Estate Planning Basics" workshop — partner with a local attorney
- "Life Insurance Myths Debunked" lunch-and-learn at a local business
- "Living Benefits: Insurance That Pays While You're Alive" seminar
- Financial wellness workshops at churches, PTA meetings, or community centers
- Open enrollment information sessions at local employers

## PRO TIP

When hosting events, always have a sign-up sheet for follow-up. Offer a door prize or free consultation to encourage sign-ups. Your goal isn't to sell at the event — it's to build relationships and collect contact information for follow-up.

