

OneTouchPoint for Financial Advisors

Streamline marketing materials and client communications through our secure technology platform and suite of solutions. Our flexible technology, solutions and team of experts bring marketing capabilities, brand management and production efficiencies together to save your team while reaching your business goals.

Elevate your client marketing and communications.

- ✓ Provide access to a pre-approved asset library to access, order and localize materials with modular templates.
- ✓ Leverage a single source partner, offering commercial print, on-demand printing, kitting, mailing, warehousing and distribution facilities under one roof.
- ✓ Ensure brand consistency with access to pre-approved marketing programs, materials, and more.
- ✓ Empower financial advisors with access to local, prescriptive digital & traditional marketing campaigns they can easily execute on.
- ✓ Monitor your business with transparent reporting packages and digital campaign dashboards.
- ✓ Control and manage local budgets & MDF funds —set budgets at any level.



Harness the power of OneTouchPoint



99.9% correct
order rates

We get it right the first time.
And with nationwide locations &
global network of partners—we've
got you covered



12% YOY average
spend reduction

Leverage our technology platform,
streamlined processes, and
know-how to lower direct material &
productivity costs.



3-5 days increased
speed to market

Our user-friendly platform lead to
increased adoption of self-service
orders users, getting materials to
market, faster and on brand.



500% increase in
page views

A national accounting firm leveraged
our suite of marketing services
including campaign management,
social, digital and retargeting ads.

A Certified Partner



SOC 2
Compliant



FSC
Certified

To learn more go to 1touchpoint.com
call 800-332-2348
or email info@1touchpoint.com

1TP-IO-1009 (Rev 4/25)