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COMPANY OVERVIEW

Name: 401kid, Inc.
Industry: Financial Services, Education, and Software
Client Since: February 2001

- Areas Covered:**
- A. Public Relations
 - B. Event Management
 - C. Branding
 - D. Online Marketing

- Marketing Objectives:**
1. Raise awareness on challenges of education savings and new tax-free savings 529 plans
 2. Develop formidable web presence
 3. Gain perception as a trusted resource to the press, corporations, financial planners, and families in the arena of education financing

- Campaign Results:**
- Established President as leading national authority on Education Financial Planning
 - Press achieved in major periodicals such as Barron's and Inc. Magazine
 - First-class interactive website, marketing materials, and collateral developed
 - Increased web traffic from under 5,000 to over 50,000 hits per month in a six month time span (a 1000% increase)

I. The Challenge

401kid is a start-up software company in the relatively new niche market of education financial planning. While families have been faced with the dilemma of college savings for years, the steady pace of tuition inflation has outpaced that of income growth for families, making the cost unbearable for most.

With an innovative product suite under development, 401kid (at that time named MYSA) engaged Blue Liner in February 2001 in order to devise its marketing campaign on a limited budget. Major venture funded competitors and financial institutions are in the market as well, making the challenge all the more difficult.

Blue Liner Assessment: (Cons) Stiff competition, limited budget, financial product introduced during bear markets, non-distinct brand identity; **(Pros)** Innovative idea is solution to growing problem, visionary leader, good technology plan.

II. The Strategy

It was clear that MYSA was in need of a brand overall or extension from its original premise in order to capture the attention of customers. Before proceeding with any type of public relations, event planning, or online marketing, the identity and mission of the business needed to be crystallized.

Once the brand and the pitch were consistent, a relentless media calling campaign was planned and executed. The 401kid media pitch centered on the demystifying of college planning for families and truly objective financial advice, two angles that make sense given the rising cost of college and financial services industry scandals (hence mistrust of financial institutions by the public).

In order for a new company to establish credibility in any market, there must be a front man or woman who delivers press worthy, industry relevant messages to the media. The amount of press received will grow proportionately to the degree that the lead spokesperson becomes a public figure. In the financial services industry, seminars and panel discussions represent the perfect opportunity to get a client on stage. Lastly, the web strategy for a company that primarily offers internet-based advice is naturally critical. Between a mixture of Cost Per Click (CPC), Affiliate Programs, and Search Engine Optimization, Blue Liner sought to increase 401kid.com's traffic from its starting point of 5,000 hits per month.

III. Campaign Results

Areas Covered	Highlights
A. Public Relations	Press in major media categories (TV, radio, magazine, newspapers)
B. Event Management	Honored with speaking engagements at NAPFA (National Association of Personal Financial Advisors); qualified for several venture fairs
C. Branding	New brand and tagline created; interactive website designed
D. Online Marketing	Traffic on website and subscription level increased dramatically, Cost Per Click campaign
Next Steps (Plan for 2004)	Plan launch of employee benefits platform; Search Engine Optimization