



# Advisor marketing playbook.

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In an industry like financial services, trust is a difficult thing to attain.



The ways in which financial advisors engage with their clients — and potential clients — are quickly changing in both tone and strategy. Just think about how we manage finances today versus 20 years ago before the rise of mobile applications, secure online networks, and access to digital platforms.

As advisors, it's important to see the digital shifts in the financial services industry. With the ability to reach a wider audience via powerful tools, like websites and social channels, generating customer referrals has become much more attainable.

There are certainly plenty of options available to advisors when developing a marketing strategy, but none of these options are as powerful and effective as leveraging content.

# Content marketing is not a strategy, it's a necessity.

Content marketing isn't a new concept, but it's an extremely valuable way for a financial firm to earn the trust of their audience.

Many otherwise savvy professionals make the mistake of believing that the content marketing strategy that worked for another firm will also work for them. The truth is, a lot of unique factors go into determining whether your particular strategy will be successful.

Creating content can seem like a scary task – especially if you've never done it before, or if you have no idea what type of content your audience would like. More so, content marketing is by no means a "set it and forget it" kind of concept. To the contrary, you have to put a real, concerted effort into getting your content seen and, more importantly, shared.

But there's no reason to fear — we've put together a proven formula for creating content that converts!

The 5-step framework to  
producing stellar content  
(that leads to results).

# 1. Know your customers.

In order to create compelling content that your audience wants, it's important to know who your audience is. Understand and develop your ideal customer — what's their age, interests, occupations — and then create content exclusively for them. Everything from client acquisition to retention should go back and reference your ideal customer. For example, if your ideal customer is a 55 year old professional nearing retirement, it's probably not a good idea to create a blog post on how to set up your first 401(k). However, creating a short video on how to boost your retirement savings when you're within a decade of retiring will probably hit home with your audience.

## So how can you develop your ideal customer type?

Short answer: Research.

From surveys to interviews to candid conversations, here are some practical ways to gather information surrounding your customer type.

- Review your client records to see if you can easily spot any trends on how prospects or clients find and digest your content.
- Start asking new clients how they first discovered your firm - was it a referral from an existing client? Or perhaps they spotted an ad or stumbled upon your social media?
- Inquire what makes your current clients happy and continue to stay with your firm. Use this to help frame your value to future clients.

Use this research to identify patterns and drive your content creation to meet the needs of this ideal client.

## 2. What's your ideal customer's biggest challenge

Now that you know who your audience is, what is their biggest pain point?

What keeps them up at night? Are they looking for an advisor they can develop a deeper relationship with? Are they interested in transitioning from a current advisor to a new one? Are they looking for advice on a particular subject, like equity compensation?





## Not sure what your client's biggest challenge is?

Don't worry, here are a few places to start:

- What are your clients saying online? Search popular finance blogs for the most common questions and complaints from individual investors.
- Pay attention to the news. When big events take place, it can spur an influx of people searching for financial help.
- Browse social media channels, hashtags, and groups to see what prospective and current clients are talking about.
- It's always a good idea to know what pain points your competition or other firms in the area are addressing.
- If you're tech savvy, take a look at your website analytics or perform a Google keyword search. This will allow you to identify the most popular search phrases that you can create content to directly address.
- Simply ask your clients! Use a survey (like mentioned above) to gather valuable insight into what challenges them most.

Whatever their specific challenge is, your content should highlight it and speak to it in an understanding and empathetic way.

### 3. How would their life change if you fixed their problem

After identifying the problem, what would happen if you solved it? In order to truly deliver high value to your clients, the first thing you need to do is to solve their problems in an innovative way that works exactly for them.

Advertising 101: help your audience see themselves in the shoes of the person they want to be or in the place they want to be. Paint a picture and explain in detail how your ideal customer's situation would change once they accepted your solution. This is also a great place to differentiate your services and expertise in the market.



## 4. What's standing in their way

In today's competitive market, there is always hesitation or a little voice of doubt in the back of your prospect's mind. Don't take it personally, this is your opportunity to ease that worry proactively by addressing what the hurdle is and how to overcome it. This means delivering a one-of-a-kind customer experience, providing exceptional service, and developing a long-term relationship with each client.

Most importantly, you can reduce hesitation by being honest and genuine with prospects. Ask questions and explore uncertainties together. Most of the time, when you shine light into that little dark spot, turns out it's nothing!



## 5. Make them an offer (that they can't refuse)

At the end of the day, conversions are one of the most important metrics when it comes to content. This means leading your audience to complete an action, moving them further down your client acquisition funnel.

Whether this is your first impression with your prospect or you've been nurturing them for some time, each piece of content you create should have a compelling—not to mention persuasive—call-to-action (CTA).

It's typically best to end with a strong finish, and content is no different. Present an irresistible offer to your audience at the end of a blog post or in your email signature. It can be as simple as "reply back to this email" or a bit more direct like "complete this form to get access to XYZ offer."

Here are a few examples of strong CTAs that are proven to convince people to act:

Learn More

Sign Up

Start Saving

Let's Connect

Get Help Now

Your Future Starts Here

Let's Talk About Your Financial Goals

Whatever the offer is, make sure it correlates with the subject at hand. A good formula for creating a strong CTA is to combine a powerful action verb with a reason. And don't forget, always be testing your CTAs—try different color combinations, words, placement, etc. There's always room for improvement!

When you approach content creation from a standpoint of building relationships and making connections, it's much less intimidating. You don't have to create 20 page documents stuffed with facts and figures—trust us, that's not what will reach your target anyway. Just be yourself. The rest will fall into place. And if you can't figure out what your audience wants, ask them!

Marketing can be hard, we get it. That's why we built a (free) network for financial advisors to learn how to grow their business from their peers and experts in the industry. Visit [grow.altruist.com](https://grow.altruist.com) to start learning how to take your practice to the next level.

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