

The Biggest Marketing Trends For Advisors In 2024

**Learn which marketing strategies
to keep and which to toss.**



Wednesday, May 15
12:00 pm PT | 3:00 pm ET

An award-winning marketing suite. Built just for you.

2024



#1 in Digital Marketing

T3 Advisor Software Survey 2024



Practice Management Solutions Provider of the Year

Wealth Solutions Report 2024



Top in Customer Satisfaction

T3 Advisor Software Survey 2024



2024

2022 & 2023



Best Marketing Automation

WealthManagement Industry Awards 2022



Social Media

WealthManagement Industry Awards 2022-2023



Executive Leadership Award For Fintech Platforms

ThinkAdvisor Luminaries 2023



Our expertise is showing off yours.

fmg



Samantha Russell

Chief Evangelist, FMG

Connect

 @SamanthaTwenty

 /samanthacrussell

 srussell@fmgsuite.com



Susan Theder

Chief Marketing and Experience Officer, FMG

 @stheder

 /susantheder

 stheder@fmgsuite.com



Chevonne Farler

Financial Advisor, TBH Advisors


 /chevonnewfarler

 farlerwm.com


#1

Zero- Click Content

Old Way: Tease Content → Share Link

 **Barron's Advisor**
7,101 followers
1d · 🌐

Choose your platform wisely, don't neglect video, and stay open to experimentation, counsels this marketing executive. <https://lnkd.in/eEqPnzha>
[#socialmediamarketing](#) [#financialadvisors](#)

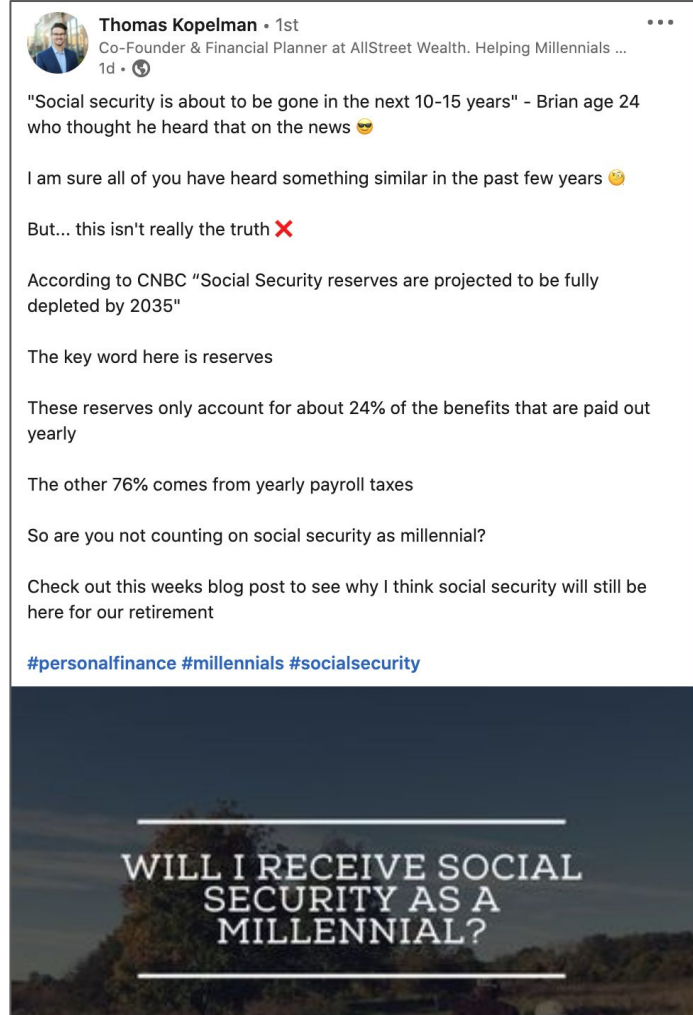



A 5-Point Social-Media Plan for Your Firm
barrons.com · 4 min read

Now 

“ZERO-CLICK CONTENT”

fmg



Thomas Kopelman • 1st
Co-Founder & Financial Planner at AllStreet Wealth. Helping Millennials ...
1d • 

"Social security is about to be gone in the next 10-15 years" - Brian age 24 who thought he heard that on the news 😊

I am sure all of you have heard something similar in the past few years 😊

But... this isn't really the truth ❌

According to CNBC "Social Security reserves are projected to be fully depleted by 2035"

The key word here is reserves

These reserves only account for about 24% of the benefits that are paid out yearly

The other 76% comes from yearly payroll taxes

So are you not counting on social security as millennial?

Check out this weeks blog post to see why I think social security will still be here for our retirement

[#personalfinance](#) [#millennials](#) [#socialsecurity](#)

WILL I RECEIVE SOCIAL SECURITY AS A MILLENNIAL?

Real Advisor Examples:

Find both of these examples in the FMG library (general and DIFM)



Chris DeWolfe · 2nd
Managing Partner at Investment Consulting G...
[Book an appointment](#)
2w · 🌐

+ Follow ...

Are election years typically good years for the stock market?

For those who are curious, here's some interesting historical ...see more

S&P 500 Annual Stock Market Returns During Election Years

2000	-9.1%	Bush vs. Gore
2004	10.9%	Bush vs. Kerry
2008	-37.0%	Obama vs. McCain
2012	16.0%	Obama vs. Romney
2016	12.0%	Trump vs. Clinton
2020	18.4%	Biden vs. Trump

Stocks are measured by the Standard & Poor's 500 Composite Index, which is an unmanaged index considered to be representative of the overall U.S. stock market. Index performance is not indicative of the past performance of a particular investment. Individuals cannot invest directly in an index. The returns and principal values of stock prices will fluctuate as market conditions change. Shares, when sold, may be worth more or less than their original cost.

👍👍👍 3 2 comments

👍 Like 💬 Comment 🔄 Repost ✈️ Send

Add a comment...

Most relevant ▾

Frank Schiller · 3rd+
First Director at Public Interests Research and Communicatio...
2w · ...

Great insights here on the US presidential election cycle and market trends. Valuable perspective on historical patterns and economic fundamentals over long-term investment strategies. Thanks for sharing!

Jeff Hurst, CPA · 2nd
President at Hurst Financial Consulting LLC
Follow ...

Do you think your tax rate will be higher in the future?

Look at this chart by YCharts showing the historical tax rates for the lowest and highest tax brackets.

For the highest bracket, the historical average (not the high) is 57.69%, although we are currently at 37%.

Some believe that taxes may increase in the future. Here are the facts:

- Higher tax rates may be part of any proposed solution to the current U.S. deficit.
- The time to manage your taxes is when you understand the current rates.

Every person's situation is unique, but as we approach year-end, a Roth IRA conversion for a portion of your retirement portfolio may be a strategy to explore a bit more.

A Roth IRA must meet a 5-year holding rule and occur after age 59 ½ for the tax-free and penalty-free withdrawal of earnings. Tax-free and penalty-free withdrawals can also be taken under certain circumstances, such as the owner's death. The original Roth IRA owner is not required to take minimum annual withdrawals.

This post is for informational purposes only and is not a replacement for real-life advice, so make sure to consult a tax professional before moving forward.

#RothConversion #RothIRA

■ US Individual Income Tax: Tax Rates for Regular Tax: Highest Bracket
■ US Individual Income Tax: Tax Rates for Regular Tax: Lowest Bracket

75%
57.69% AVG
50%
37%
25%
11.51% AVG
10%
0%

1920 1940 1960 1980 2000

Yes, you can still share links. But GIVE the meat away



A screenshot of a tweet from Emily Binder (@emilybinder) dated August 25. The tweet text reads: "Wells Fargo study says women exhibit several important strengths related to investment success: Discipline, Willingness to learn, Risk-taking. Women trade 23% less frequently but outperform men by 1.3% avg during bear markets. By @danielcrosby: fa-mag.com Why Women Are The Ultimate Behavioral Investors When it comes to managing money and investments, women exemplify much stronger ...". The tweet includes icons for replies, retweets (4), likes (9), and a share icon.


Emily Binder @emilybinder · Aug 25

Wells Fargo study says women exhibit several important strengths related to investment success:

- 🏃 Discipline
- 🧑 Willingness to learn
- ⚠️ Risk-taking

📅 Women trade 23% less frequently but outperform men by 1.3% avg during bear markets

By @danielcrosby:

 fa-mag.com
Why Women Are The Ultimate Behavioral Investors
When it comes to managing money and investments, women exemplify much stronger ...

🗨️ ↻ 4 ❤️ 9 📤

#2

Using AI to Generate Content



write me (a financial advisor) a social media post that explains the Secure Act 2.0



Hey everyone!



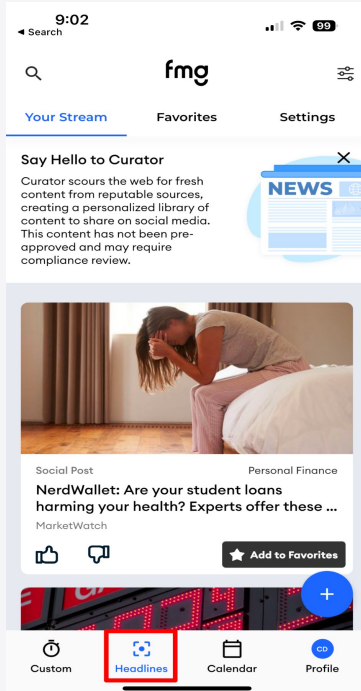
I wanted to take a moment to talk about the Secure Act 2.0, which was recently passed by Congress and signed into law by the President. This important piece of legislation includes a number of provisions that are designed to improve the retirement security of Americans.

One of the key provisions of the Secure Act 2.0 is the expansion of required minimum distribution (RMD) age from 70.5 to 72. This means that if you are over the age of 72, you will no longer be required to take RMDs from your traditional retirement accounts (such as 401(k)s and traditional IRAs). This change can be especially beneficial for those who are still working and do not need the extra income from their retirement accounts.

The Secure Act 2.0 also includes provisions to make it easier for small businesses to offer retirement plans to their employees, as well as measures to encourage lifetime income options in workplace retirement plans.

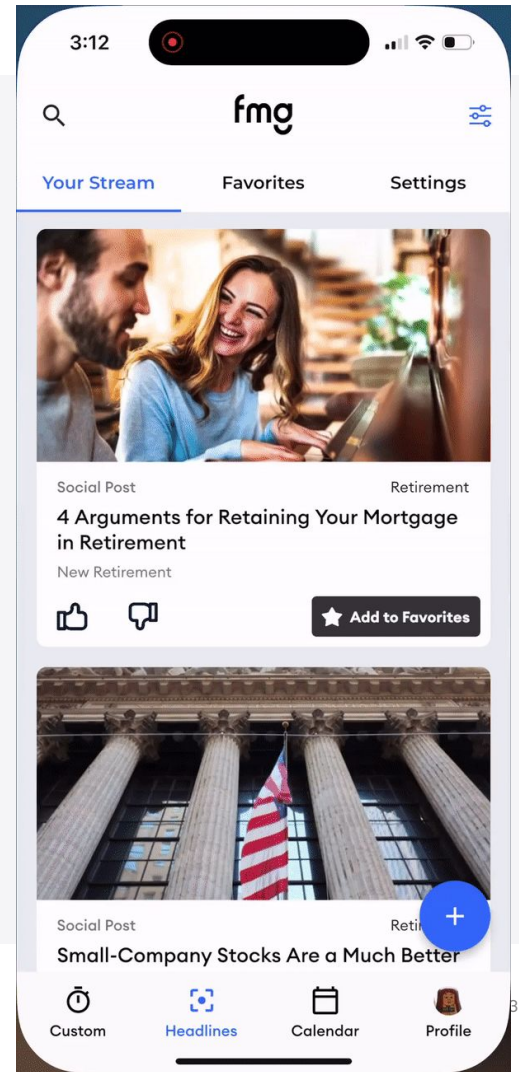
Overall, the Secure Act 2.0 is a positive step forward in the effort to improve retirement security for all Americans. If you have any questions about how these changes may impact your own retirement planning, don't hesitate to reach out to me.

Browse and Choose Your Content

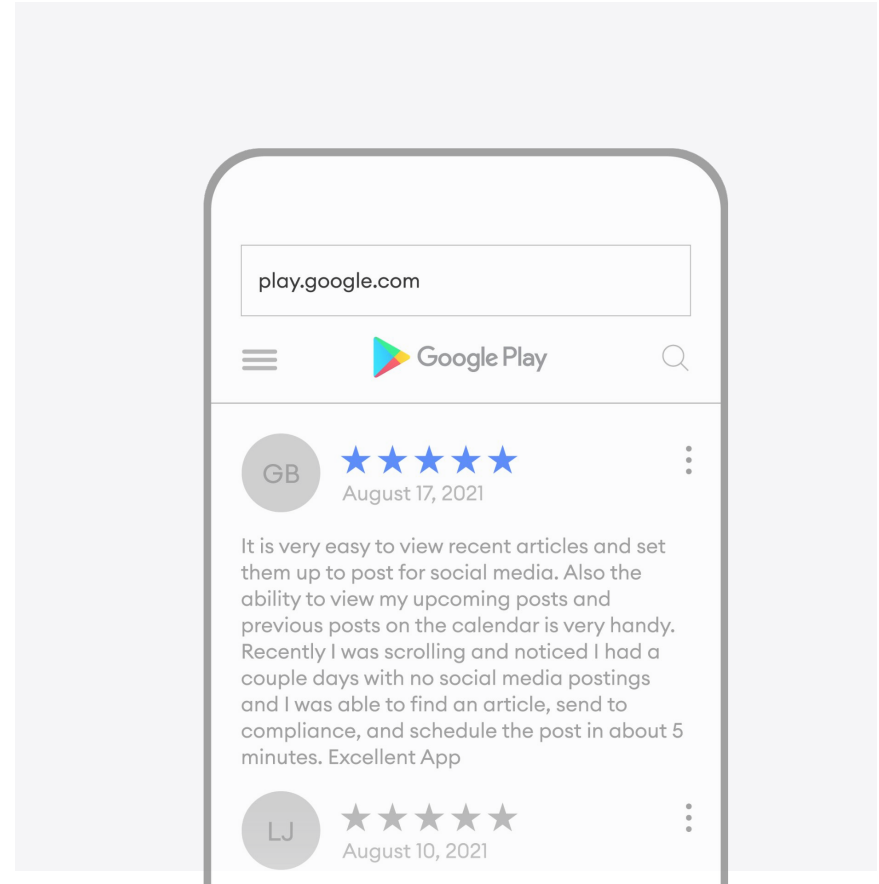


Add Your Caption

- Write Your Own Text
- Write Text For Me



Download the FMG App!



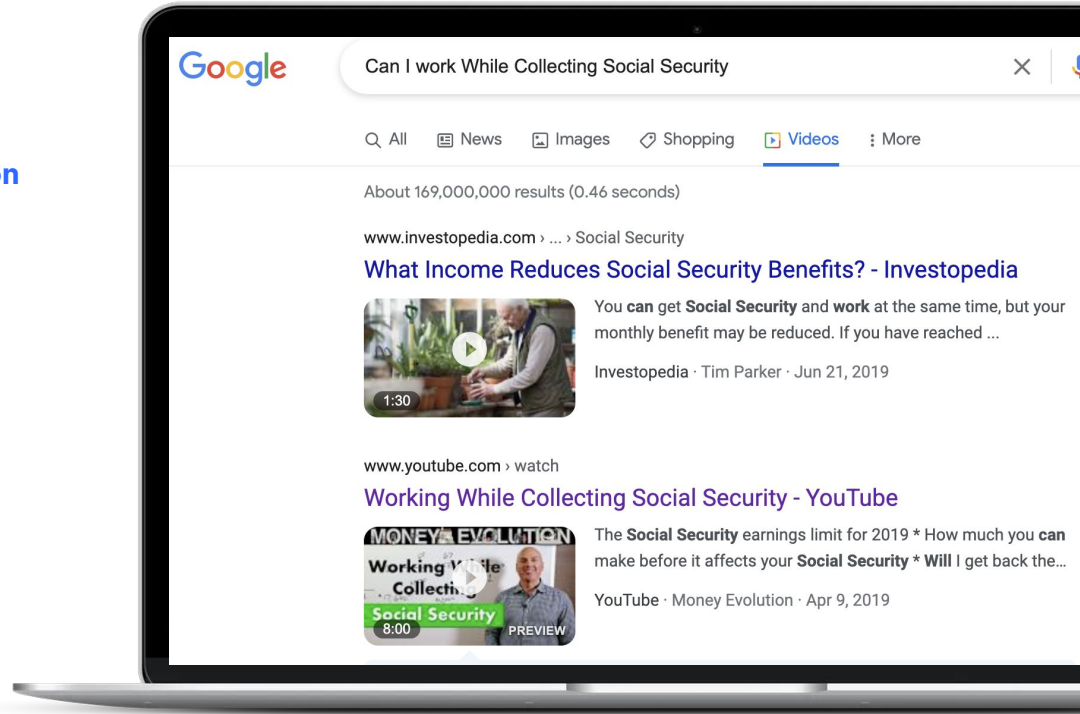
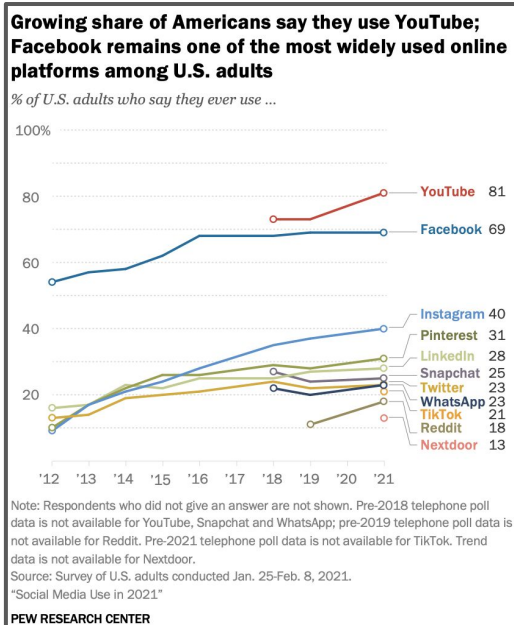
#3

Short Form Video

Video

1. Popularity of Short-Form Video EXPLODING

2. More people listen to podcasts on Youtube than on Spotify!



Source: <https://blog.twentyoverten.com/a-financial-advisors-guide-to-youtube/>

Use Video as an Introduction to Your Firm

Where to Use this?

→ On the homepage

Source: wealthkeel.com



The screenshot shows the homepage of WealthKeel LLC. At the top, the navigation menu includes 'SERVICES', 'THE WEALTHKEEL DIFFERENCE', 'WHO WE SERVE', 'INSIGHTS', 'FAQS', and 'CONTACT'. A 'Schedule Icebreaker Call' button is located in the top right corner. The main content area features a section titled 'Our Focus on Physicians' with a paragraph of text and a video player. The video player shows a man speaking, with a 'MORE VIDEOS' button and a 'ction' button overlaid. The video player interface includes a play button, a progress bar showing 0:04 / 3:56, and icons for 'Watch later', 'Share', 'CC', 'Settings', and 'YouTube'.

WEALTHKEEL LLC

SERVICES THE WEALTHKEEL DIFFERENCE WHO WE SERVE INSIGHTS FAQS CONTACT

Schedule Icebreaker Call

Our Focus on Physicians

Our founder decided to work with physicians after a move to Philadelphia surrounded him with young physicians facing some of the most complex and important financial decisions of their lives... and with no one to rely on. WealthKeel chooses to work with Gen X & Gen Y physicians due to the unique complexities that this group faces.

We are passionate about serving Gen X & Gen Y physicians. Why? We firmly believe this group of hard-working professionals has been dealt a difficult hand and faces a lot of critical financial decisions.

Chad Chubb of WealthKeel LLC

Watch later Share

MORE VIDEOS: ction

0:04 / 3:56

CC Settings YouTube

The Video Bio

Where to Use this?

→ “About Us”
or “Our Story” page

Source: druckerwealth.com



The screenshot shows the top of the Drucker Wealth website. The header includes the logo 'DRUCKER WEALTH' with the tagline 'Financial Planning | Wealth Management' and navigation links: 'ABOUT US', 'WHO WE SERVE', 'WHAT WE DO', 'RESOURCES', and a 'START HERE!' button. Below the header is a black and white photograph of a man (Bernie Drucker) holding a child, with a dog in the foreground. To the right of the photo is the heading 'Here's How We Got Started' followed by two paragraphs of text. Below the text is a video player showing a man (Lance Drucker) speaking, with a caption 'LANCE DRUCKER, CHFC®, CLU®, PRESIDENT'.

DRUCKER WEALTH
Financial Planning | Wealth Management

ABOUT US WHO WE SERVE WHAT WE DO RESOURCES **START HERE!**

Here's How We Got Started

To explain who we are, we'll start with where we came from. Our third-generation financial planning firm was founded in 1959 by Bernie Drucker. Today, Bernie's legacy of using comprehensive planning to help families find financial independence is carried on by his son Lance and grandson, Gideon.

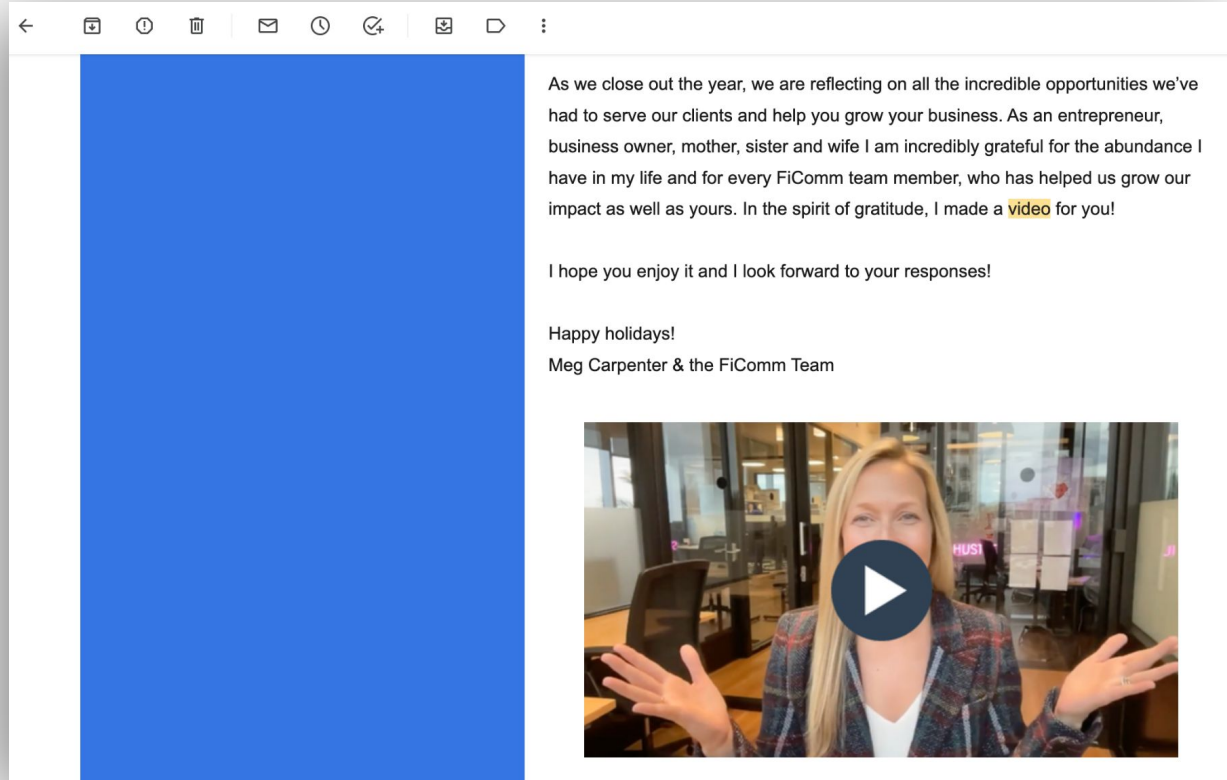
Over the past 3 generations and 63 years, we have provided objective financial advice to individuals and families looking to reach their financial potential. As fiduciaries we specialize in working with motivated & successful high earning professionals looking to take control of their financial future. Our whole approach is meant to help these HENRY's (High Earners Not Rich Yet) find their financial footing as, together, we design their interactive & ever evolving [Financial Life Plan®](#).

LANCE DRUCKER, CHFC®, CLU®, PRESIDENT

Video Emails

Where to Use this?

→ *Emails to Clients and Leads*



NEW! With FMG you can now easily upload video to email

Add A New Custom Email Section

What type of content do you want to add?



Text



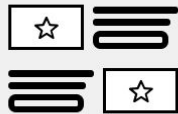
Image



Widgets



Featured Content



Multi-Content



Curator Content



Add Section

Upload a featured video.

Video



Divider

Cancel

Add Section

Upload A Video



Timestamp



Never Mind

Select Thumbnail

#4

Center of Influence (COI) Marketing

Strategically Reach Out to COIs

All (2458)	Web Content (439)	Emails (532)	Social Posts (998)	Greeting Cards (265)	Downloadables (224)
On	☆	Title	Type	Author	Actions
<input type="checkbox"/>	☆	New COI Email Campaign: Business Brokers	Email	Do It For Me	Details Use Start Blog
<input type="checkbox"/>	☆	New COI Email Campaign: CPAs	Email	Do It For Me	Details Use Start Blog
<input type="checkbox"/>	☆	New COI Email Campaign: Divorce Attorneys	Email	Do It For Me	Details Use Start Blog
<input type="checkbox"/>	☆	New COI Email Campaign: Estate Attorneys	Email	Do It For Me	Details Use Start Blog
<input type="checkbox"/>	☆	New COI Email Campaign: General Practice Atto...	Email	Do It For Me	Details Use Start Blog
<input type="checkbox"/>	☆	New COI Email Campaign: Insurance Agents	Email	Do It For Me	Details Use Start Blog
<input type="checkbox"/>	☆	New COI Email Campaign: Tax Attorneys	Email	Do It For Me	Details Use Start Blog
<input type="checkbox"/>	☆	New COI Email Campaign: Trust Underwriters	Email	Do It For Me	Details Use Start Blog

Scan to get a drip series sample from our DIFM program! 📩



Do It For Me Program Content Sample – Estate Planning Email Drip Series

Brought to you in [partnership](#) with Wealth.com

Email #1

Subject

Here's why you shouldn't wait to create an estate strategy

Body

Legacy is a significant aspect of any financial strategy. It's important to consider what happens to everything you've accumulated—and may continue to accumulate—throughout your lifetime. But far too often, we've seen this as something overlooked. Even as recently as 2023, [barely one-third of Americans had wills](#).

Often, the lack of an estate strategy (even a will) is for a seemingly valid reason: People don't know how to get started. Or they believe it's a complicated process. Or they don't think they have enough assets to need one.

But creating an estate strategy is about more than just knowing what will happen with your stuff. It can help...

- Manage complexities associated with your estate.
- Provide a backup decision-maker in case you become incapacitated.
- Define who you want your beneficiaries to be.
- Define family members you don't want to be beneficiaries.
- Have an approach to what happens to any pets you have.
- Help manage family infighting after you're gone.
- Guide your beneficiaries, and create a structure for your children.
- Put an outline in place for any scenario where you're unable to make decisions.

Whether you're newly married, starting a family, or nearing retirement, an estate strategy is likely something on your mind. But even if you're early on in your career and haven't hit any of these milestones, considering an estate strategy can be important.

Some elements of an estate strategy can include a(n)...

- **Last Will & Testament:** This document defines your wishes after you pass. This includes naming your executor or a personal representative who would represent your estate before the probate court and outlining what you'd like to happen to any minors or anyone else requiring guardianship (like someone with special needs). A will also describes how you want your property and other assets to be distributed.

Power of Attorney: This assigns to someone the right to make financial decisions for you, including documents or making financial transactions, should you become incapacitated or otherwise to do so yourself.

Health Care Directive: This empowers the person you designate to make decisions about medical treatment, including end-of-life care. In addition, this document often specifies what care decisions you wish for in certain medical situations.

Trust to your strategy: A trust is an agreement with a set of rules that the creator of the trust puts in place for the person you designate to oversee the trust (the trustee), including how the trust's property and possessions to be divided and who you want in charge of that process. Trust involves a complex set of tax rules and regulations. A professional who is familiar with the rules and regulations can provide guidance on how a trust could work with your estate.

Why people put off creating an estate strategy is because they think it's an intensive or complex process, but it doesn't have to be. Remember, just creating the most basic estate documents can be helpful for you and your family.

We can help you discuss your estate needs and how we can help you get started.

Subject

You may be able to take advantage of the doubled federal tax exemption with your estate strategy

Body

There's a ticking clock that you should take advantage of. It was part of the 2017 Tax Cuts and Jobs Act (TCJA), and right now, it may be one of the most important levers you can pull.

The TCJA doubled the lifetime estate, gift, and generation-skipping transfer tax. In 2024, the exemption amount is \$13.61 million for individuals and \$27.22 million for married couples at the federal level. Unless Congress changes this law, the exemption will revert back to its 2017 level, adjusted for inflation. The TCJA exemption amounts can be captured only through use for taxable gifts (or transfers at death) before December 31, 2025.

According to Forbes, as we're in the advent of the Great Wealth Transfer — with more than \$84 trillion expected to pass to younger generations in the coming decades — the clock is ticking to develop a strategy that can incorporate the TCJA's features.

**Build Rapport.
Invite COIs to
meet YOUR
audience:**

**Ask them to
Join You for a
Webinar!**

fmg



Post on social media and tag @ the COI's business



fmg FMG 17,550 followers 2w • Edited • 🌐

Want to start a podcast, but don't know where to start? If so, our next workshop with [ProudMouth](#) is ...see more

fmg **PROUD MOUTH**

Launch Your Advisor Podcast In 5 Simple Steps

(And Make It Work In Your Marketing Mix)

THURSDAY, MAY 2, 2024

12:00 pm PT | 3:00 pm ET

Matt Halloran
Co-Founder & Chief Relationship Officer at ProudMouth

Sumantha Russell
Chief Evangelist at FMG

Susan Proder
Chief Marketing & Experience Officer at FMG

#5

Webinars, Workshops and In-Person Events

Webinars (23%) and blogs (14%) remain underutilized across all firms, despite their potential to reach a wide audience efficiently with a targeted message.

2022 Study of Best Practices For Financial Advisor Marketing



2023 The Kitces Report: Marketing Survey

Revenue Per New Client Of Marketing Tactics

Revenue per new client, a fundamental indicator of marketing return, ranges from \$10,000 for client appreciation events down to \$2,000 for social media. Figure 16 shows the five best-performing tactics in terms of attracting high-revenue clients.

Figure 16. Top Tactics By Revenue Per New Client

Tactic	Revenue Per New Client
Client Appreciation Events	\$10,000
Webinars	\$7,750



Webinars/Virtual Workshops

1. Answer questions your clients + prospects have

- Allows people to get to know you
- Video + slides or video only or slides only
- Tools like Zoom make it so easy

2. Bring on other “experts” - expand your reach

- Ask guests to invite their list as well
- Make it easy for guests to share with their network after

3. Create once, repurpose multiple times

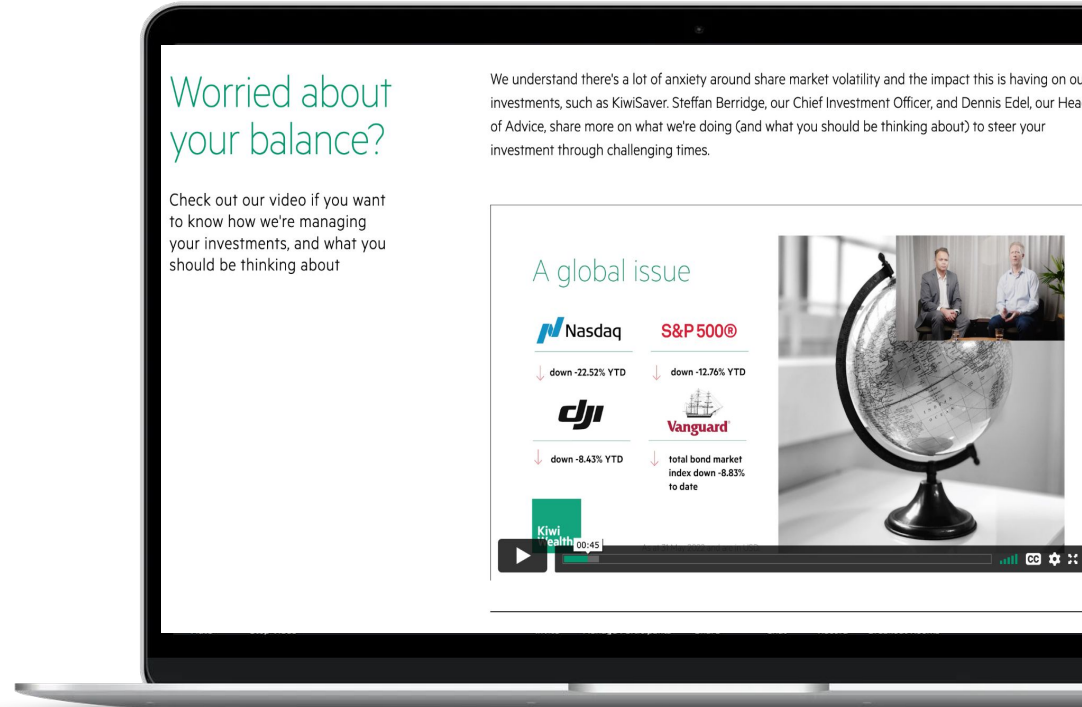
- Allow people to watch after “on demand”
- Create clips for social media
- Put replay on Youtube (SEO)

Resource:

<https://blog.twentyoverten.com/how-to-use-webinars-to-generate-leads-for-your-advisory-business/>

fmg

Source: <https://www.kiwiwealth.co.nz/market-volatility-webinar/>



What's the Best Way To Get Registrants?

Send **THREE** emails for optimal performance. Make sure clients know they can share with friends!

- 1 week before
- 1 day before
- 1 hour before

Number of Email Reminders	Average Registrants	Percentage increase over 1 email reminder
1 email reminder only	256	-
2 email reminders	474	+85%
3 email reminders	807	+215%
4 email reminders	798	+212%

Source: <https://danielwaas.com/how-to-increase-webinar-attendance-rates/>

Webinar Topics: What Should you Talk About?

Timely Topics

- Pending legislation
- Quarterly Market Recaps

Niche-Specific Topics

- Specific to doctors, business owners, etc

Evergreen Topics

- Taxes
- Social security/Medicare

Source:
<https://www.jclfg.com/events/social-security-basic-rules-and-claiming-strategies>

The screenshot shows a webinar page for 'Social Security: Basic Rules And Claiming Strategies' on October 27, 2022, from 6:00p to 7:00p EST. The page includes a description of the webinar, a list of questions to be addressed, and a list of topics to be covered. The JCL Financial Group logo is visible in the top left and bottom left of the page. A video player at the bottom shows a man and a woman discussing documents, with a title card that reads 'SAVVY SOCIAL SECURITY PLANNING Basic Rules and Claiming Strategies' and identifies the speaker as James C. Lynch, AIF, RICP, JCL Financial Group, 54 Friends Lane, Suite 112, Newtown, PA 18940. The video player also shows a progress bar at 57:30 and various control icons.

JCL FINANCIAL GROUP

Home About Us Services

27 Oct Social Security: Basic Rules And Claiming Strategies

DATE AND TIME
Thu, Oct 27, 2022
6:00p - 7:00p EST

LOCATION
Webinar

DESCRIPTION

You have questions:

- How much can I expect to receive from Social Security?
- Why does it matter when I apply? And when should I do it?
- Do I have to actually retire to get benefits?
- Will Social Security even be there for me?

In just 30 minutes, we'll cover:

- How to decide when to collect your benefits.
- How to coordinate benefits with your spouse.
- The Social Security options available to divorcees.
- How the death of a spouse affects your Social Security benefits.
- How work affects your benefits.
- How your benefits are taxed—and what you can do about it.

You need to know:

- How to avoid making a poor (and almost irreversible) Social Security claiming decision.
- The huge impact of survivor benefits on smart claiming decisions.
- How recent legislative changes may have impacted your strategy.
- What to do if you were counting on a claiming strategy that's no longer available.

54 Friends Lane Suite 112

JCL FINANCIAL GROUP

Social Security: Basic Rules and Claiming Strategies

James Lynch

SAVVY SOCIAL SECURITY PLANNING

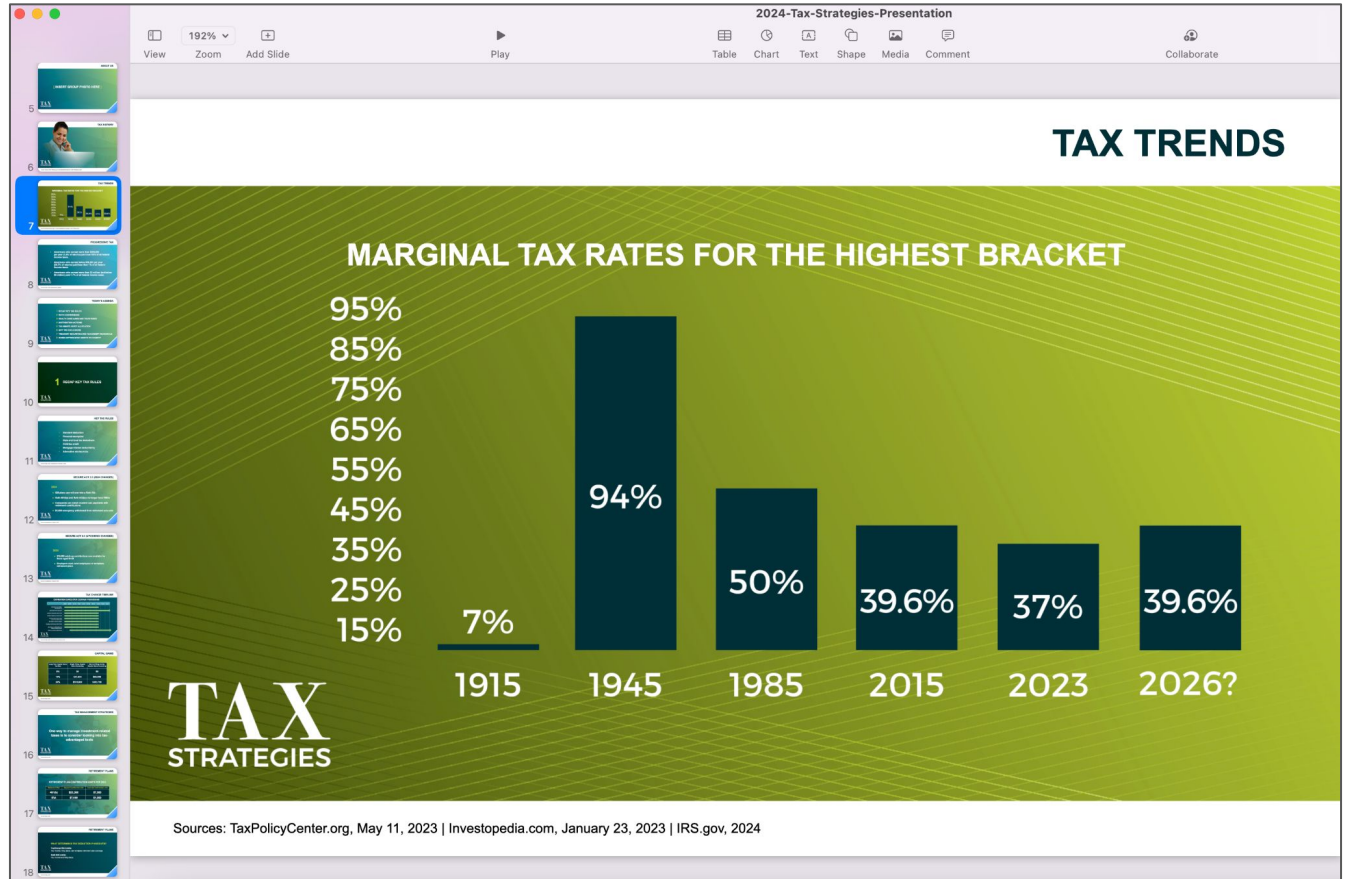
Basic Rules and Claiming Strategies

James C. Lynch, AIF, RICP
JCL Financial Group
54 Friends Lane, Suite 112, Newtown, PA 18940

57:30

vimeo

FMG Creates Webinar Slides, Landing Pages, Invites For You!



#6

Outsourcing

Do you know what you are sending via email,
posting to social or adding to your website this
week?

What about this month?

Not having a plan is planning to fail



Do It For Me Calendar | April 2024

Check out the content recommendations.

The default is to send emails to ALL contacts and social platforms that are connected. If you want to select a more targeted group, let us know in your email reply.

Let us know if you've added any new clients this month so we can be sure to send them the New Client Welcome Series and add them to your ongoing campaigns.

Key

- Email (E)
- Social media (S)
- Blog (B)
- FMG automation

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
31 Easter	1	2 B: Give Your Children the Gift of Financial Literacy S: April is National Financial Literacy Month	3 E: Empower Your Children with Financial Literacy Skills	4	5 Monthly Market Insights S: Financial Friday: Tips for Teaching Children & Teens About Finances	6
7	8	9	10 S: National Siblings Day	11	12 S: Financial Friday: Social Security Month	13
14	15 Tax Day S: Tax Day: April 15, 2024	16 Video of the Month B: Create a Strategy to Protect Your Wealth with Potential Estate Tax Changes Looming S: National Healthcare Decisions Day: April 16	17 E: TCJA - Impact on Estate and Gift Strategies	18	19 S: Financial Friday: TCJA and The Impact on Estate & Gift Strategies	20
21	22	23 S: Motto for April	24	25	26 S: Financial Friday: Preparing for Homebuying Season	27

Do It For Me Marketing Program

Outsource what you can, so you have time to do the things only YOU can do.



Follow the 80/20 Rule 🙌 🙌

For every **1** thing you post to your own feed,
Comment on at least **5** other people's posts

Advisors Love Our “Do It For Me” Program

We got a client because of you guys. They were reading the emails you sent out, they made an appointment, and we are working together - a million dollar client. Just keep doing what you're doing. I'm not on the FMG calls so I don't know what it is, but it's definitely working. ~ *Henry H., March 2024*

Want to learn more?

Book a time to talk with us →

Meet With Us: <https://fmgsuite.com/get-a-demo>

Questions? Marketing@fmgsuite.com

We're here to help.

