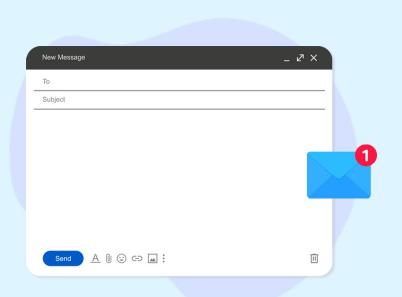
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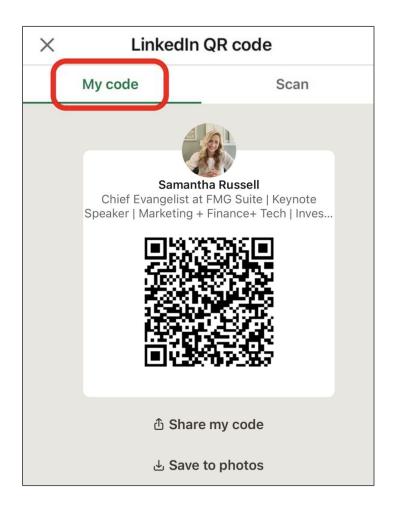
LIVE WORKSHOP:

Communications Workshop

Convert More Prospects





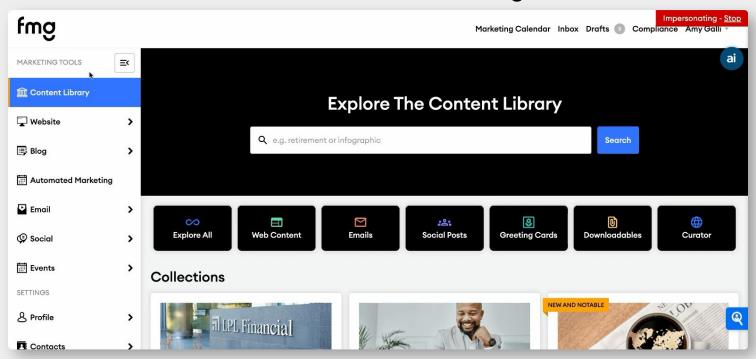


Samantha Russell

Chief Evangelist, FMG

- (in) /samanthacrussell
- (a) samantha.russell@fmgsuite.com

FMG is the only all-in-one compliant marketing solution for financial advisors. We make email marketing a BREEZE









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#1 in Customer Satisfaction Four Years in a Row

MarTech Breakthrough Award (2019-2022)



Technology Providers Marketing Automation

WealthManagement Industry Award (2022)



Social Media Leadership

WealthManagement Industry Award (2022-2023)



Best Social Media Distribution Software

MarTech Breakthrough Award (2021-2022)



Susan Theder Executive Leadership

ThinkAdvisor Luminaries (2022)



Samantha Russell Thought Leadership

ThinkAdvisor Luminaries (2021)



DEI Focused Workforce

Diversity for Social Impact Certification (2022)



Women Friendly Workplace

Diversity for Social Impact Certification (2022)



Best Overall Fintech Mobile App

MarTech Breakthrough Award (2022)

Communications Checklist Coming Your Way!

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Communications Checklist

Create consistent email and text communications to **stay top-of-mind with your clients and prospects**.

Define Your Communication Channels

- O Em
 - Ideals for newsletters and comprehensive information
 - Perfect for personalized messages like birthday and anniversary celebrations
- Textin
 - · Best for quick, personalized messages
- Great for <u>appointment confirmations</u> and document follow-up

Segment Your Audience

- O Minimum segments: Clients and Prospects
- O Advanced segmentation by:
 - Investing stage
 - · Retirement proximity
- Lifestyle interests
 Specific financial goals
- · Hobbies or demographic characteristics

Email Best Practices

- O Craft Compelling Subject Lines
 - · Use attention-grabbing, value driven language



Leverage free AI tools or subjectline.com for optimization

- O Personalization Techniques
- · Address recipients by name
- · Tailor content to specific segment needs
- Add a personal touch

*YCharts

"Mail Munch

75% of clients left or considered leaving their advisor in 2023 due to infrequent communications*

engagement by 10X**

Email and texting combined can increase customer

fmasuite.com | markeus



Consistent communications are integral for... Client retention AND lead generation

9 out of 10 clients consider their advisors' communication frequency and style when deciding whether to retain their services + make referrals

Yet about half (47.1%) of surveyed clients wish their advisor would contact them more frequently



Most Widely Used Marketing Strategies By Financial Advisors

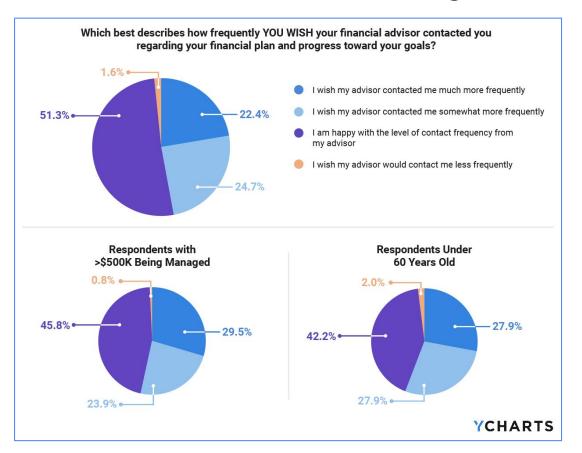
Marketing Strategy	% of Advisors Using
Client Referrals	93%
COIs	60%
Networking	47%
Social Media	42%
Client Appreciation	36%
Website	31%
Blogging	30%
Education Events	29%
Seminars	26%
Firm Brochure	26%
Drip Marketing	24%
SEO	22%

Marketing Strategy	% of Advisors Using
Videos	12%
Paid Web Listings	11%
Online Ads	10%
Marketing Consultant	10%
Direct Mail	9%
Paid Advertising	8%
Webirars	8%
Book	7%
Solicitors	7%
Podcasts	7%
Radio	5%
Custodial Referrals	5%
Marketing Lists	3%

© kitces.com LLC

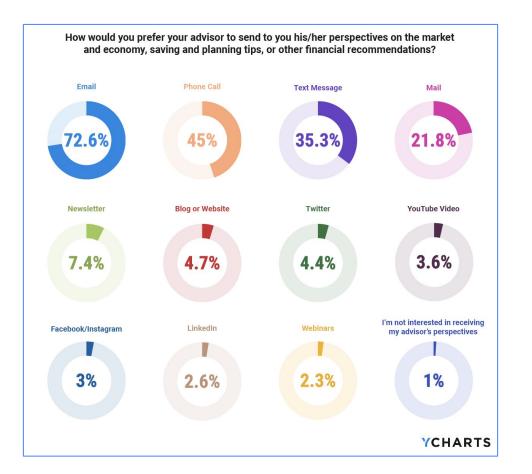


Client Communication is KEY to Organic Growth

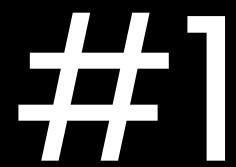




And Email is the form most clients want....

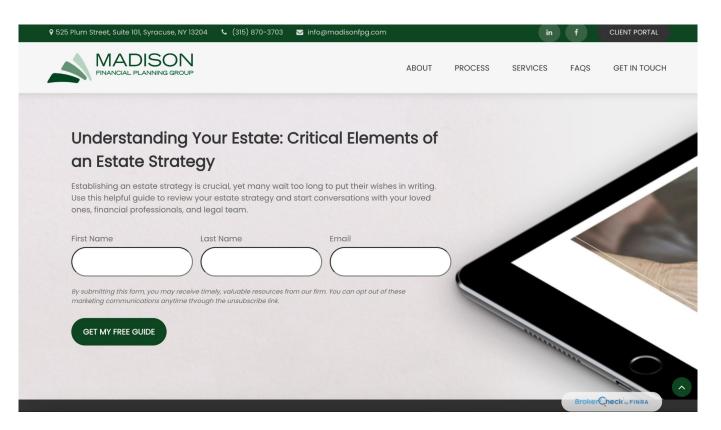






Start By: Building a Quality Email List

97% of Website Visitors do not convert - capture them!





Source: https://www.madisonfpg.com/estate-planning Guide/Download available for FMG Customers to add to your website

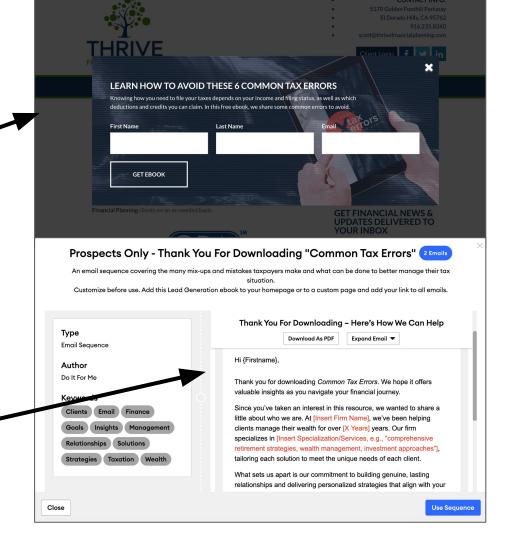
Drip Email Marketing

FIRST:

Collect prospect emails on your site

THEN:

- Email them over time valuable, educational, TIMELY content that is HELPFUL
- Gets even more effective if you have a niche



Drip Email Marketing

Once you have a prospect's email:

 Send weekly, bi-weekly or monthly (at a minimum) emails to stay top of mind

TIPS:

- These are NOT sales emails
- Each email should show them the value you would provide to them as their advisor in some way - the more specific to them, the better



Hi {First Name}

Recently the yield curve inverted for the first time since August 2019 (which means that long-term interest rates have dropped below short-term rates).

Why do we pay attention to this?

Because this inversion suggests that investors believe the near-term economy and markets to be riskier than the long-term.

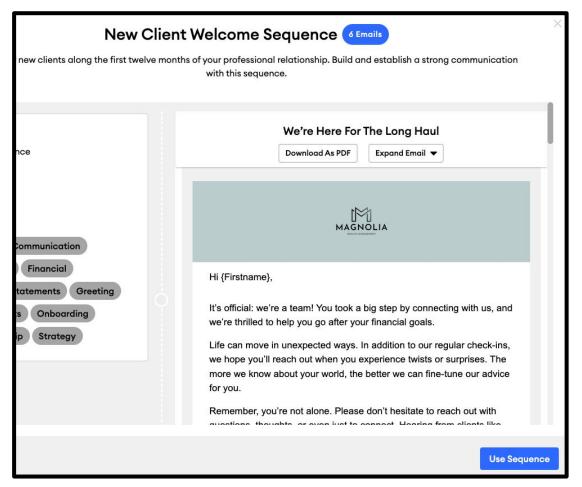
This recent inversion in the yield curve and inflation soaring above 7% have left some investors wondering whether to adjust their investment strategy. While it can be tempting to worry and want to rush and make changes, the current environment is cause for monitoring, not cause for panic.

Yes, rising interest rates, high inflation, surging oil prices, and geopolitical tensions have all contributed to economic uncertainty. And because financial markets don't like uncertainty, they have been performing accordingly.

U.S. inflation clocked in at 7.9% for the 12 months ended February 2022 — the highest rate since December 1981. Energy prices, already on the rise, jumped when Russia invaded Ukraine. In response, the Federal Reserve started raising interest rates, hoping to slow the economy without triggering

You should also follow the same pattern with Clients

- 1. Add them to a New Client Welcome Series
- 2. Add them to your CRM clients list
- 3. Add to any other relevant CRM groups





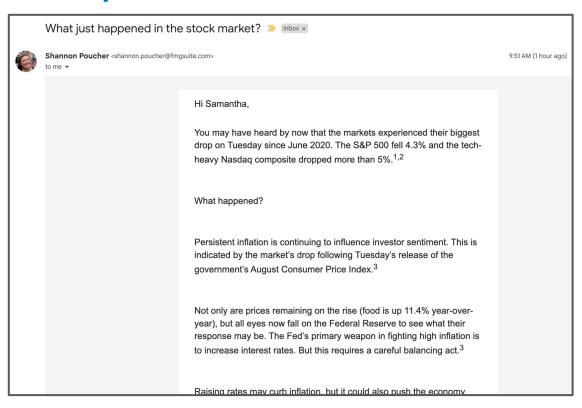
Timely Content Always Performs Best

FMG's "Do It For Me"

Marketing Program

Timely Email Open Rate: 70%

Financial Services Average
Open Rate: 24%





'Do It For Me' Marketing



Poll: Would you like to learn more about DIFM?

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Recommended Content

Blogs

<u>April 1: Spring Into Financial Wellness: Actionable Steps for Financial</u>
<u>Literacy Month</u>

April 16: From College Acceptances to Affordability: Considerations for Families in the Final Stretch

Emails

April 2: Spring Into Financial Wellness: Key Steps for Financial
Literacy Month - Clients and Prospects

April 2: Financial Literacy Month: Supporting Our Mutual Clients'
Financial Wellness - COIs

April 17: From College Acceptances to Affordability: Insights for
Families in the Final Stretch - Clients and Prospects

April 17: From College Acceptances to Affordability: Considerations
for Families in the Final Stretch - COIs

FMG Automation

Monthly Market Insights – Social Post and Email: Around the 7th of Each Month

Video of the Month - Email Only: Third Week of Each Month

Social Posts

April 2025 DIFM General Social Sequence

April 7: 30th Anniversary of National Public Health Week

April 22: Earth Day

April 23: Administrative Professionals Day

April 2025 DIFM Financial Social Sequence

April 3: Spring Into Financial Wellness: Actionable Steps for Finan Literacy Month

April 5: Beef Up Your Password Security On 3 Key Accounts

<u>April 9: Here's How Much Money Americans Think They Need to E</u>Rich

April 11: How To Launch A Successful Business In Retirement

April 15: What Tax Docs To Keep—And What To Shred

April 18: From College Acceptances to Affordability: Advice for Families in the Final Stretch

April 29: Do This For A Happy Retirement

Build Your Email List with Social Media

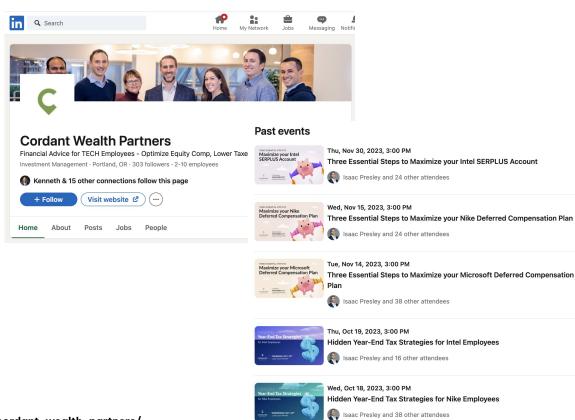
- Post a preview of what you talk about in your emails
- "If you want to get more content like this - sign up for our newsletter"
- 3. I recommend doing this at least 2x month
- 4. If someone engages on your posts, send them a personal invite via DM





Build Your Email List with LinkedIn Events

- Create an event for each individual webinar or in person event
- You can invite people directly FROM linkedin and they REGISTER from Linkedin
- Connected to 500 Nike employees? Filter and invite them all
- You can still use ZOOM to host

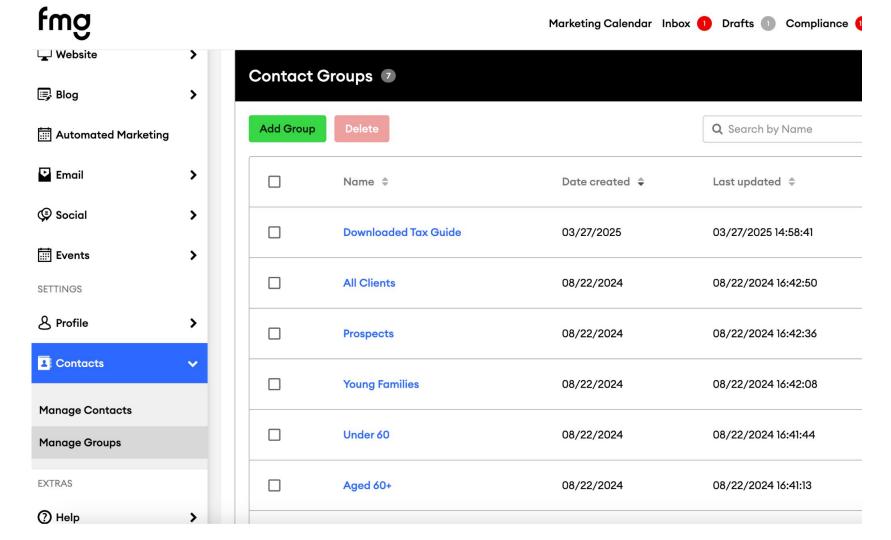


Source:

https://www.linkedin.com/company/cordant-wealth-partners/

#2

Segment Your Audience

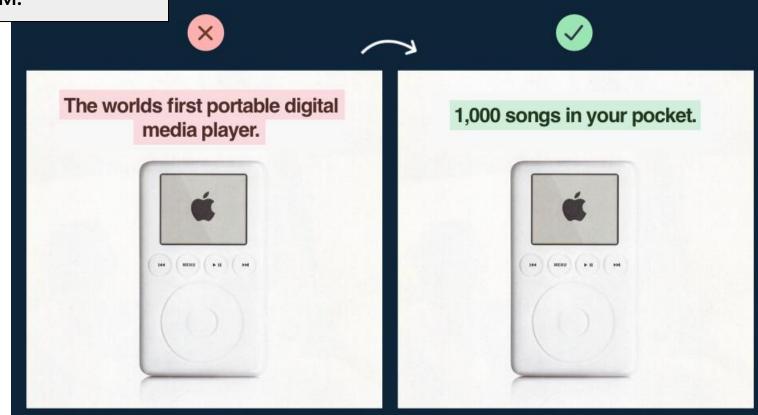


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Content: Personalize Your Messages

Messaging:

No one cares what you can do. They care what you can do for THEM.

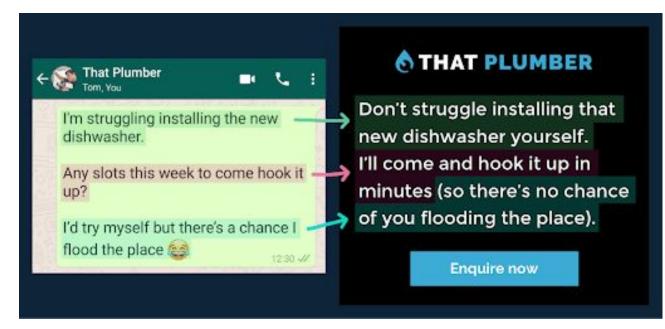


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Stop Talking like an Advisor - Start Talking Like Your Clients

What is the **PROBLEM** your clients/customers & prospects have?

What is the **SOLUTION** you provide to that problem?



Flesch-Kincaid Readability Tests

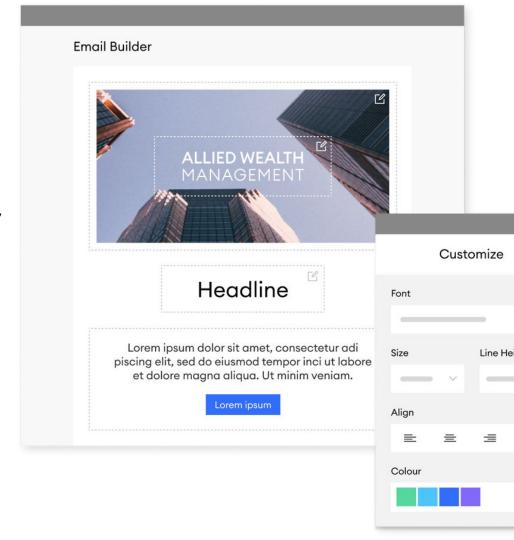
- ←Copy and paste the text into Word
- Choose Editor, and then go to Document stats
- →A dialog box will appear letting you know Word is calculating your document stats. Choose OK.
- → You want to be at a 6th 7th grade reading level!



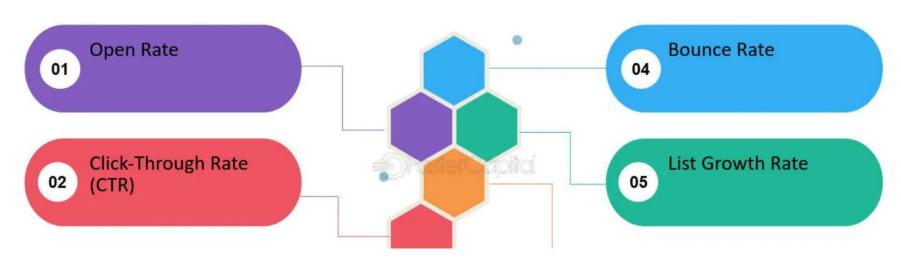
Score	School Level	Notes
100.00- 90.00	5th grade	Very easy to read. Easily understood by an average 11-year-old student.
90.0-80.0	6th grade	Easy to read. Conversational English for consumers.
80:0-70.0	7th grade	Fairly easy to read. (Average newspaper article score)
70.0–60.0	8th & 9th grade	Plain English. Easily understood by 13- to 15- year-old students. (Average website article score)
60.0–50.0	10th to 12th grade	Fairly difficult to read. Should be understood by most 16-18 year-old students.
50.0–30.0	University	Difficult to read.
30.0–0.0	University Graduate	Very difficult to read. Best understood by university graduates.

The more you personalize, the better success you will have

- Average person receives 100 emails a day
- Stand out by personalizing messages
- Use contact's first name in subject line or body
- Segment email lists based on demographics
- Tailor content based on preferences and interests



How to know if your emails are good? Monitor These KPIs



 Open Rate: 24% avg in Fin Serv

• **Bounce Rate:** Below 2%

Click Through Rate:
 Financial Services
 Averages 2.5%

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• **List Growth Rate:** Aim for 1–3% per month



Get more opens with Great Hooks (Subject Lines)

Elements to a good subject line!

- 1 Keep it short and sweet Subject lines with 6-10 words perform best. Avoid lengthy subjects.
- 2 Personalize subject lines

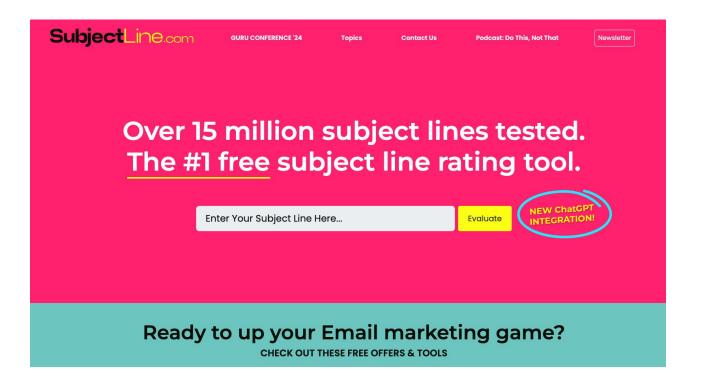
Use first names, locations, times to make it relevant to the recipient.

- 3 Ask questions
 Subjects with "how to" or "why"
 encourage opens.
- 4 Use urgency and scarcity

Phrases like "24 hours left" or "limited spots" create urgency.

A good subject line greatly impacts open rates and response. Keep it short, personalized, intriguing and urgent.

Al can help!



The more specific you get, the better success you will have

Clients/Prospects with Kids in College

Subject Line: Top 10 Money Mistakes College Students Make

Clients/Prospects who are ~5 years from Retirement

Subject Line: Top 10 financial mistakes retirees wish they wouldn't have made

Clients/Prospects who Receive Social Security

Subject Line: This is how Much Your Social Security Check will increase this year

Clients/Prospects who work at Public Tech Companies:

Subject line: What should you do with your RSUs when they vest?

5

Automate what you can

How Often Should You Email?

You're Probably Not Emailing Enough...

A recent Morningstar study asked how frequently clients prefer to be emailed.

This is what they found:

- 30.4% prefer weekly emails.
- 36.6% prefer monthly emails.
- 19.9% prefer quarterly emails.
- 9.4% prefer annual emails.

So 67%
Want AT LEAST a monthly educational email from their advisor!



A Slam-dunk client email newsletter idea

Round up articles you've read, podcasts you've listened to, etc

Link to them with your thoughts or a summary of why clients should care

Steve Jobs' Legacy for Builders - Life can be much broader once you discover one simple fact—and that is: everything around you that you call life was made up by people that were no smarter than you.

What Makes You Happy - The richest you'll probably ever feel is when you get your first paycheck, and your bank account goes from \$5 to, perhaps, \$500. The contrast that generates might be greater than going from \$10 million to \$20 million. Going from nothing to something is so much more powerful than going from a lot to super a lot.

▲ Easily Distracted? You Need to Think Like a Medieval Monk -

Focusing wasn't much easier in the time before electricity or on-demand TV. In fact, you probably have a lot in common with these super-distracted monks.

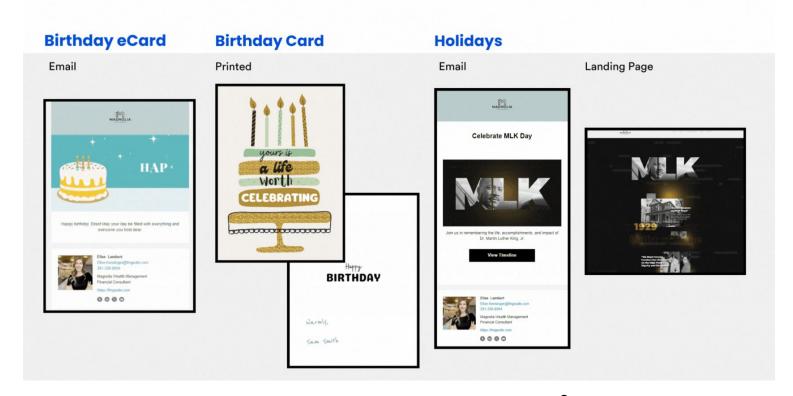
✓ OpenAl: the Next Tech Giant? - It's pretty rare for a company to transition from a research lab to a developer infrastructure provider to a behemoth consumer app in just a few years. But given the launch of ChatGPT plugins last week, there's a fair chance this could end up being the story of OpenAl.

Life Expectancy and Inequality - America is seeing the greatest gap in life expectancy across regions in the last 40 years.

Weekly Call 2 Action



Automation Examples in FMG





Source: FMG Content Dashboard

Retirement Insight Example and Monthly Market Insight Example

Monthly Market Insights

Email



Landing Page



Retirement Insights

Email



Landing Page







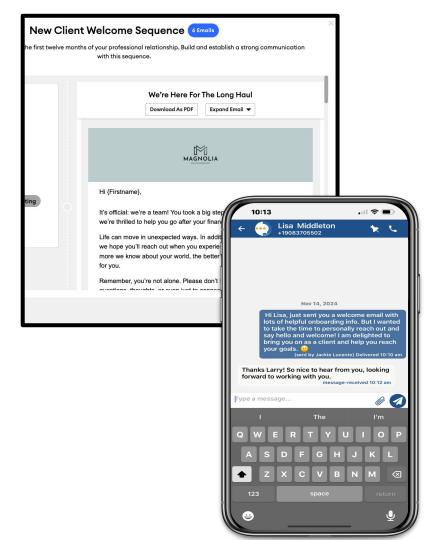
Incorporate **Texting** Into Your Communications

Leveraging email and text messaging together can Boost Engagement Rates 10x

Text and email are a strong marketing pair for financial advisors to contact clients directly while following regulations. Discover MyRepChat, a compliant text messaging platform that enhances and streamlines business communication.*

Text-Messaging - Fast Facts:

- 98% open rate
- Read rate within three minutes of delivery
- An average person in the US only completes six phone calls per day, but sends or receives 32 texts

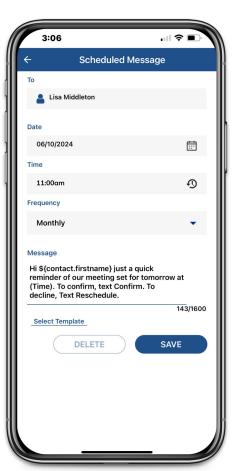


Leverage meeting reminders

Send reminders 1 week and 24 hours before the meeting for best results, and

reduce no-shows by up to 90%

Create and schedule a template like: 'Hi [Name]!
Confirming our annual review for tomorrow at [time].
Reply YES to confirm or RESCHEDULE if needed.'



Blend texting with your usual outreach methods

Integrate text like you do email—for both broad and personalized outreach.

1 to 1 AND 1 to Many



MyRepChat Distribution Lists

Send post-meeting follow-ups

Provide clear action items to

see returned paperwork in as little as 5 minutes!

Example: 'Thanks for meeting today, [Name]! Summary and action items were sent to your email. Remember to sign those beneficiary forms!'



Book Your 20-Minute Consultation

What to expect:

We'll begin by listening to your goals and challenges, then provide tailored recommendations on how to best leverage the FMG platform to help you achieve them.

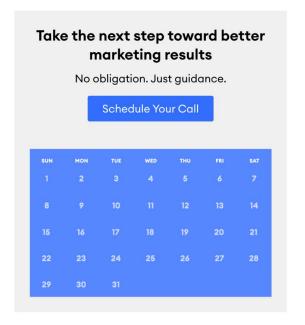




Provide Tailored Recommendations

If you're a current FMG customer with a product-specific question, please visit the Support Page.







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.

