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LIVE WORKSHOP · THURSDAY, JULY 23 · 9AM PT / 12PM ET

Why AI Is Actually the *Best Thing* to Happen to Advisors

How to use AI to strengthen client relationships, build trust, and stand out with a more human approach to marketing and communication.

Susan Theder
CMO & CXO, FMG

Dr. Daniel Crosby
Chief Behavioral Officer, Orion

Samantha Russell
Chief Evangelist, FMG

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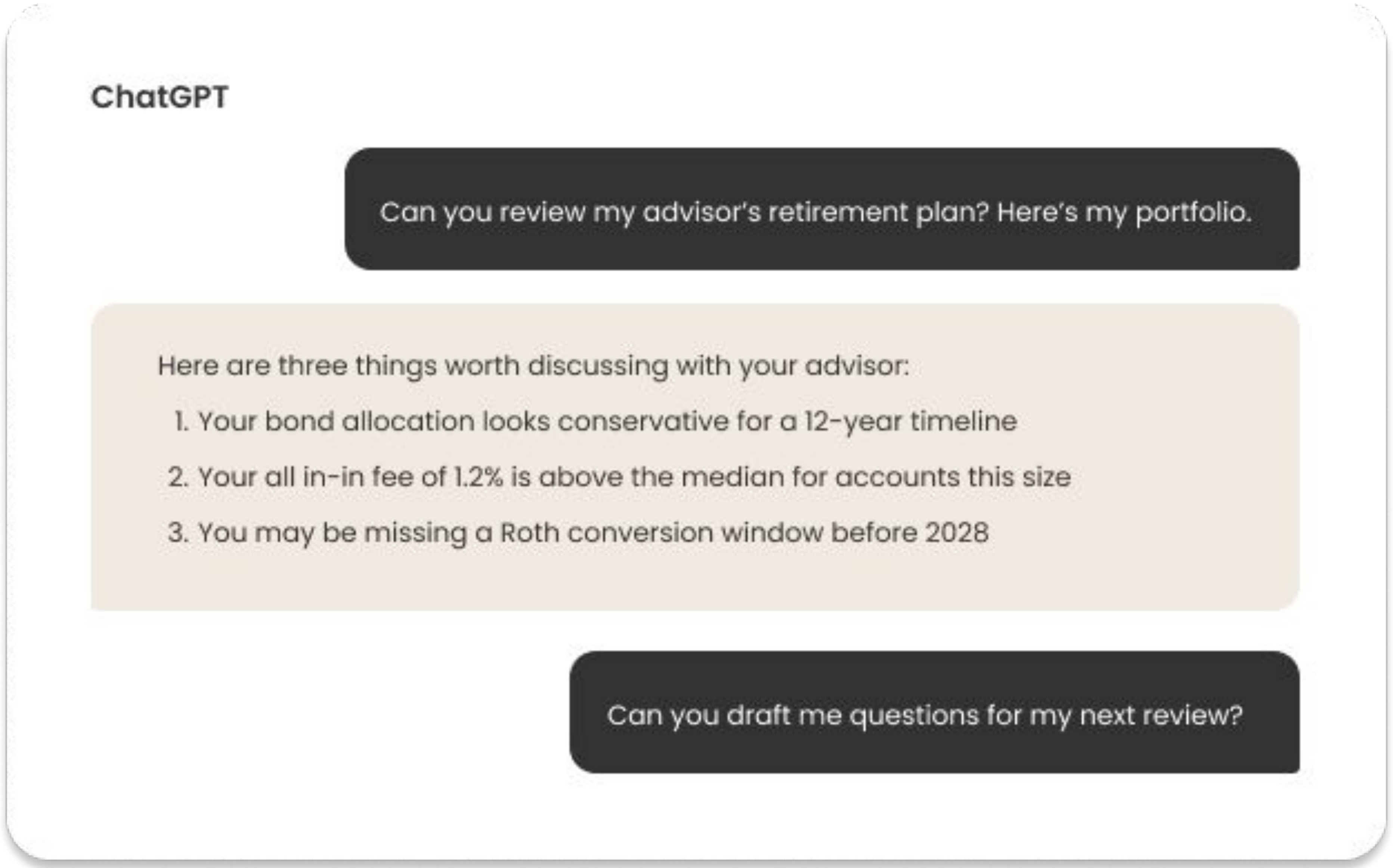
Sometime in the next 30 days, a client slides this across the table.

Most advisors will read it as a threat.

It's the best opening you've been handed in years.



POLL 1

Where do you see the greatest opportunity in your practice today with AI?

- A Deeper client engagement
- B Better prospecting & follow-up
- C Back-office efficiencies
- D More consistent personal outreach

Suleiman Najim in • 2nd

AI Agents & AI Automation | Personal Bra...

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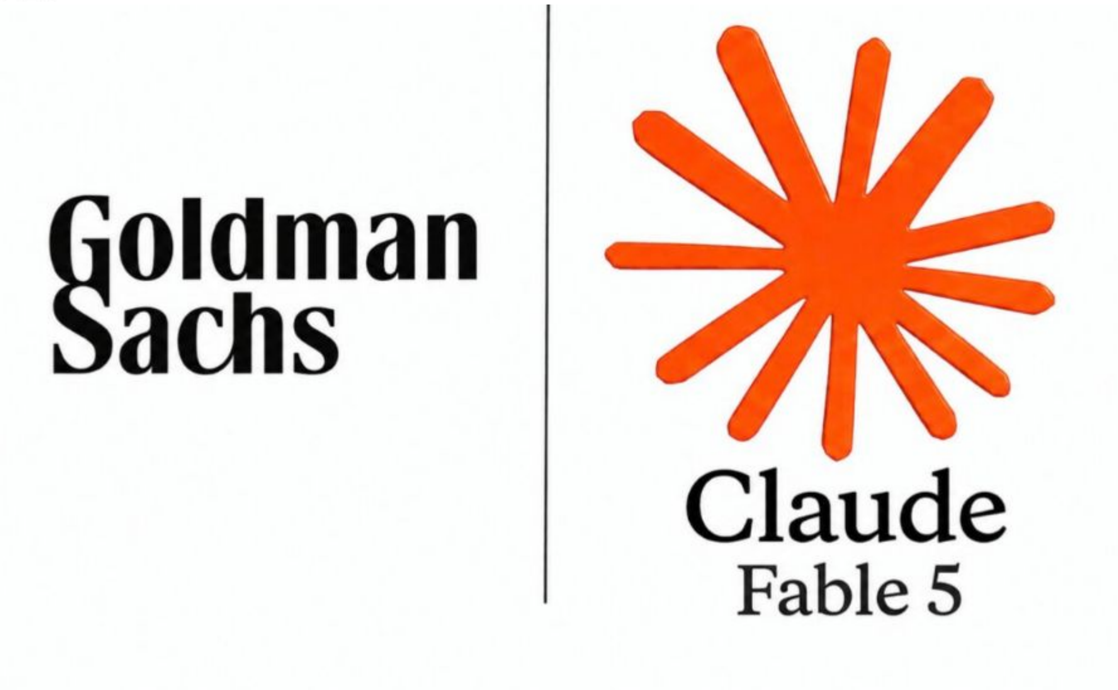
BREAKING: Goodbye Goldman!

Claude Fable 5 an now build financial plans better than Goldman Sachs wealth advisor

We packaged 21 insane Enterprise Claude Finance Skills that replace $300/hour financial advisors.

We're talking about financial planning advisors charge $500K+ per year to deliver.

Now you can build your own personalized plan in 5 minutes



111 159 comments • 2 reposts

CNBC

AI may replace your financial advisor, MIT professor says — but there's one big hurdle

Artificial intelligence can give sophisticated financial advice and may be able to replace human financial advisors in the future, financial...

Apr 6, 2026

RS Real Simple

I Let 3 Financial Advisors and an AI Bot Analyze My Finances —Here's What I'm Doing Differently Now

Financial advisors vs AI: See the best takeaways from different types of financial advising, including financial coaching,...

2 weeks ago

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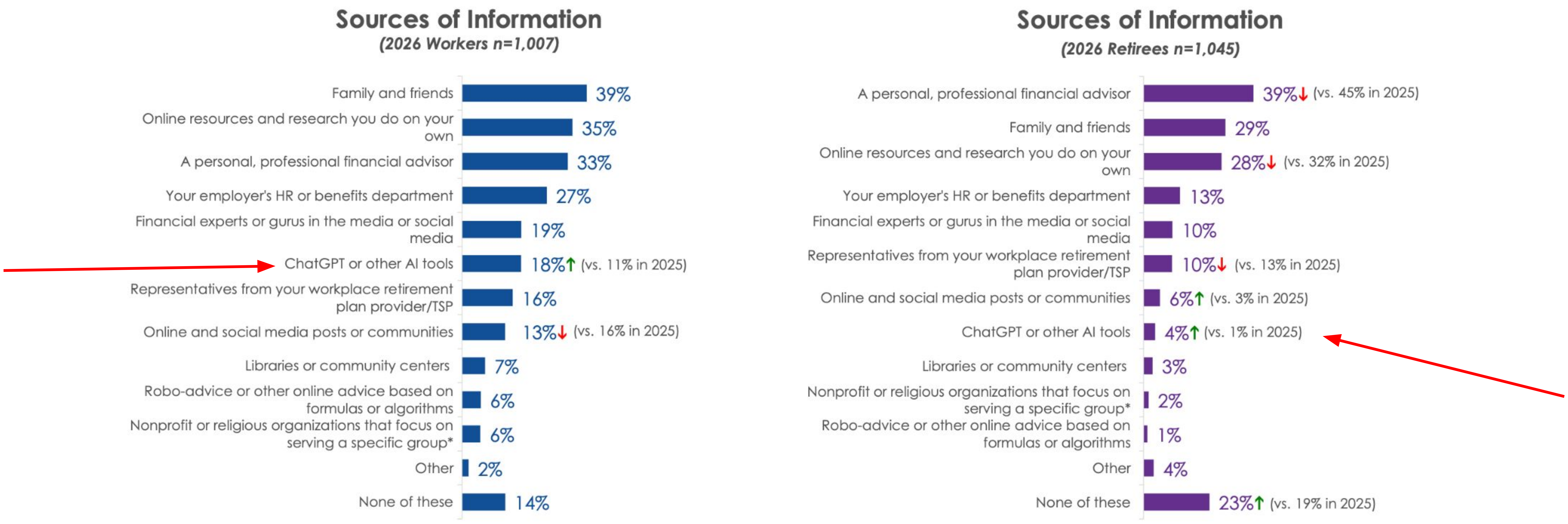
Figure 17: Almost half of workers think technology will help them manage finances as they age, and the share using AI tools as sources of information rises.



*Truncated item
↑=Significantly higher than previous year, ↓=significantly lower than previous year

2026 EBRI (Employee Benefit Research Institute)/ Greenwald Retirement Confidence Survey

Who do you trust more in the following scenarios?

	Trust Humans More	Trust AI / Gen AI More	Trust Both the Same	Not Sure
Creating a retirement strategy	**56 %**	13 %	21 %	10 %
Asking a financial question	**55 %**	15 %	22 %	8 %
Developing a tailored, robust financial strategy	**53 %**	15 %	21 %	11 %
Making portfolio decisions; building and managing investment portfolios	**53 %**	15 %	20 %	12 %
Creating a strategy to build a savings account	**53 %**	14 %	23 %	10 %
Suggesting financial products	**52 %**	14 %	23 %	11 %
Making updates to your personal customer information	**52 %**	16 %	22 %	10 %
Providing financial savings tips	**50 %**	16 %	25 %	9 %
Managing a budget and keeping on track	**48 %**	18 %	24 %	10 %

Source: Northwestern Mutual 2025 Planning & Progress Study, conducted by The Harris Poll among 4,626 U.S. adults

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Your clients are already asking AI.

49%

of consumers used AI for savings & investment decisions in the past 6 months

EY Global Survey, 2026

68%

of Gen Z consumers did the same — your clients' kids, and your next clients

EY Global Survey, 2026

36%

of AI users are asking for investing and stock market guidance

ABA Banking Journal, 2025

19%

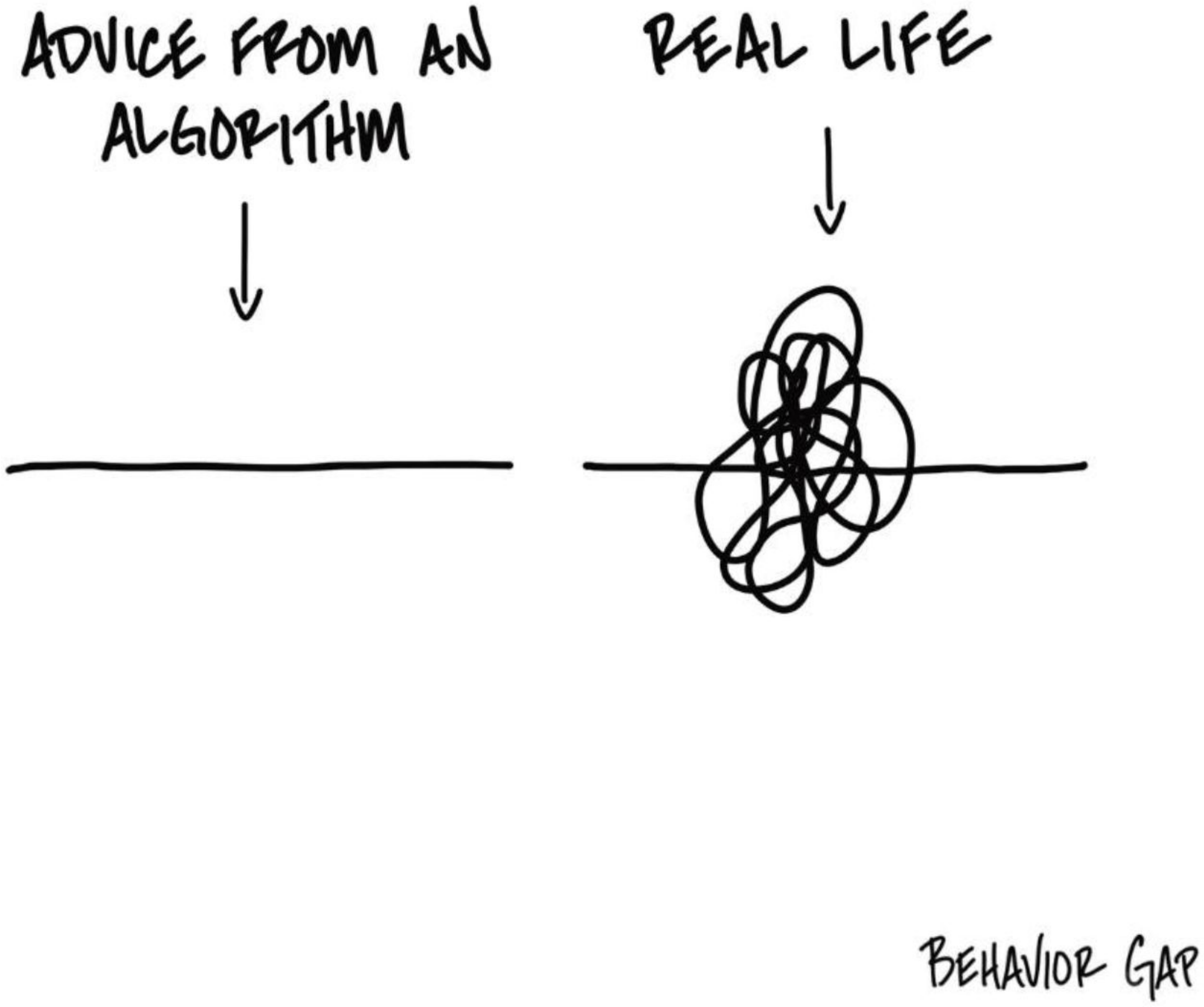
lost $100+ following financial advice from an AI chatbot

Pearl.com Survey, 2025

They're not replacing you. They're arriving more informed — and sometimes more wrong.

The AI answer may be correct. It may still be wrong for this person.

The point is not to prove the AI wrong. It's to show where information ends and advice begins.

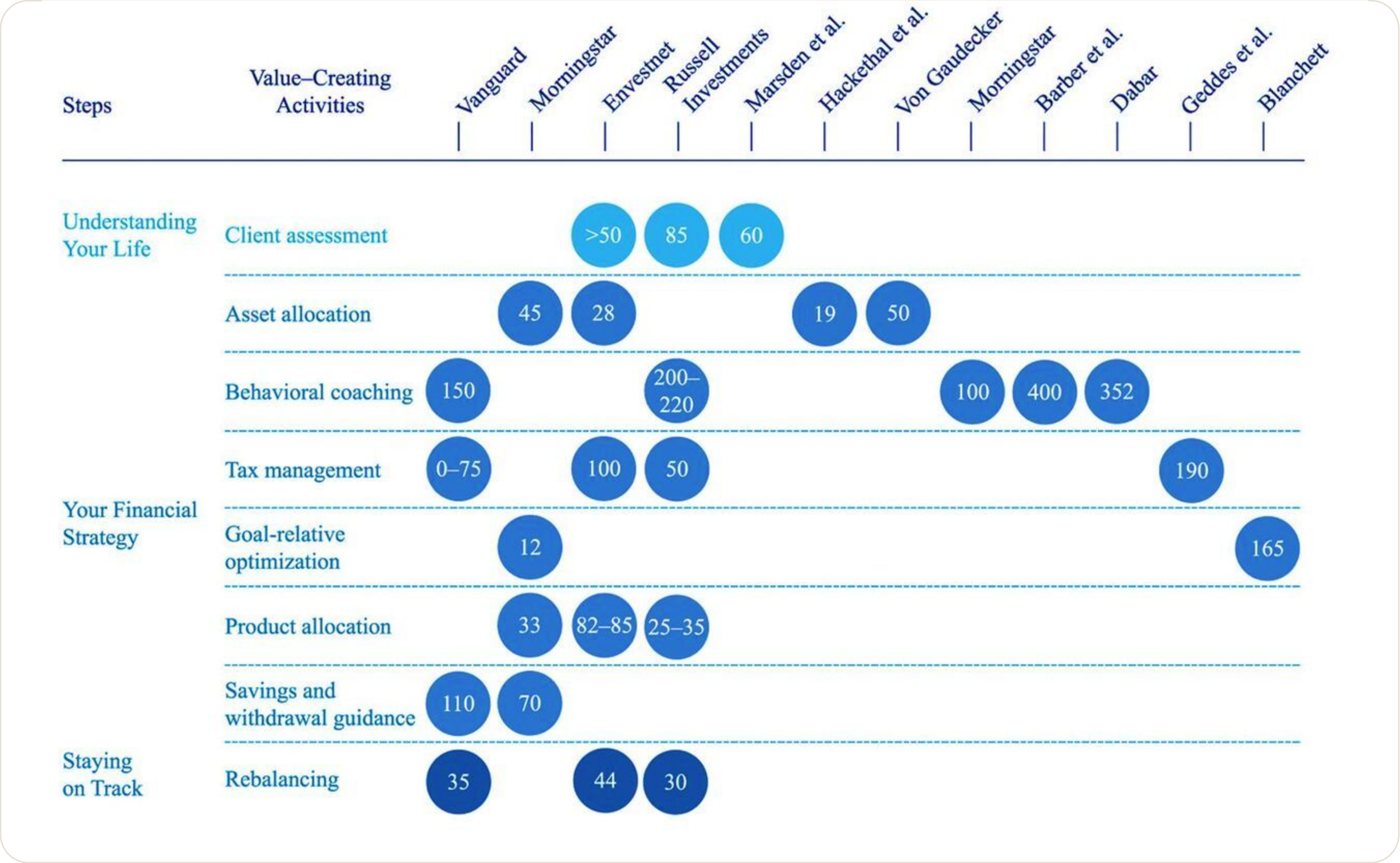


Source: Carl Richards, The Behavior Gap

The most valuable thing you do is the most human thing you do

Behavioral coaching: **100–400 bps**

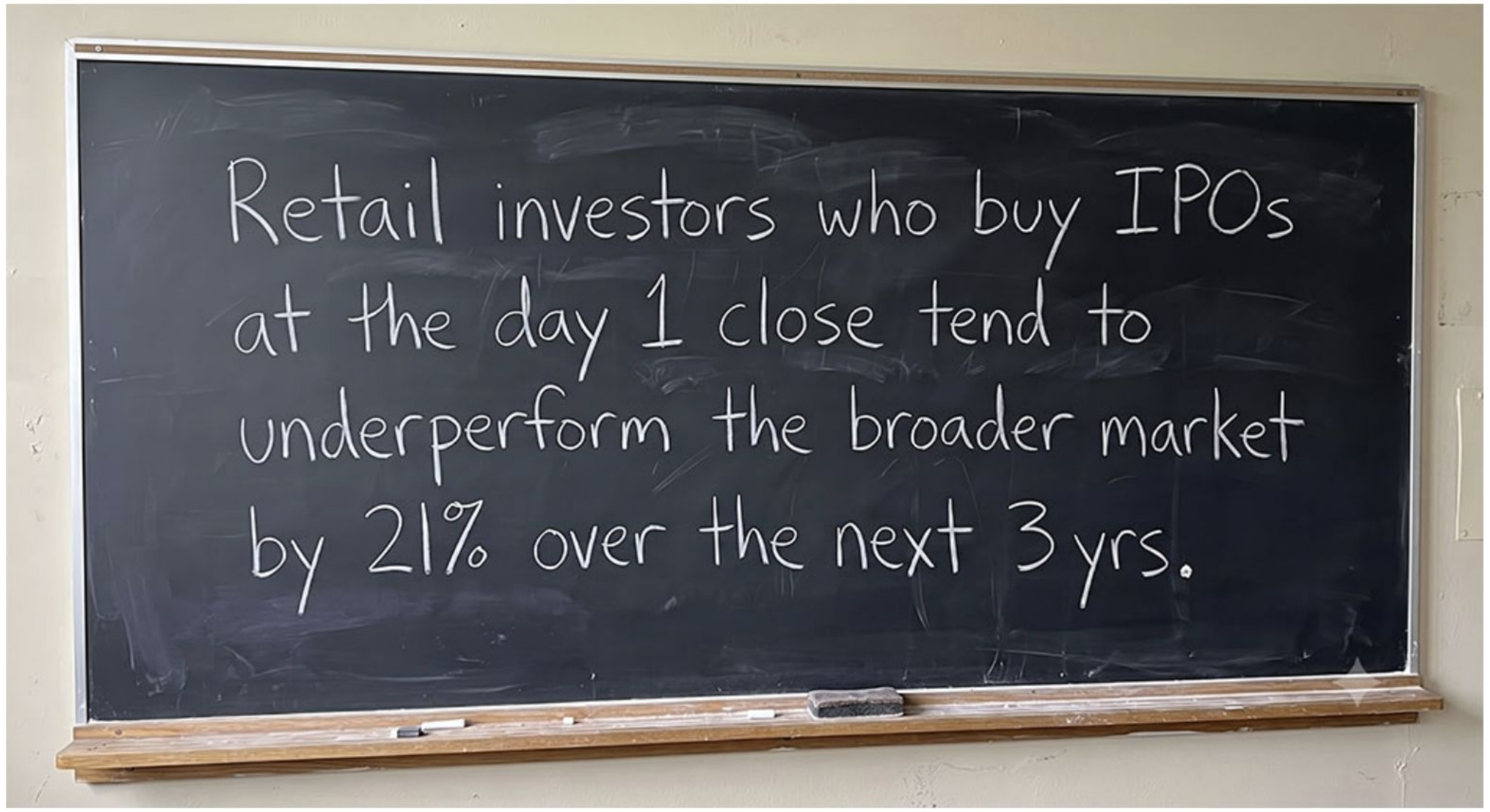
The largest value line in nearly every study on this chart — bigger than allocation, tax management, or rebalancing.



Meta-analysis of advisor value studies (Vanguard, Morningstar, Envestnet, Russell, Dalbar, et al.) — shared by Dr. Daniel Crosby

Your Content Should Address This too.

Not Just Your Conversations



IPO Reality vs. The Headline Narrative

When IPOs Dominate the Conversation

When a company that most people recognize goes public, suddenly it's everywhere.

Source: Blog Post Advisors Can Use As Part of FMG's Do It For Me (DIFM) program

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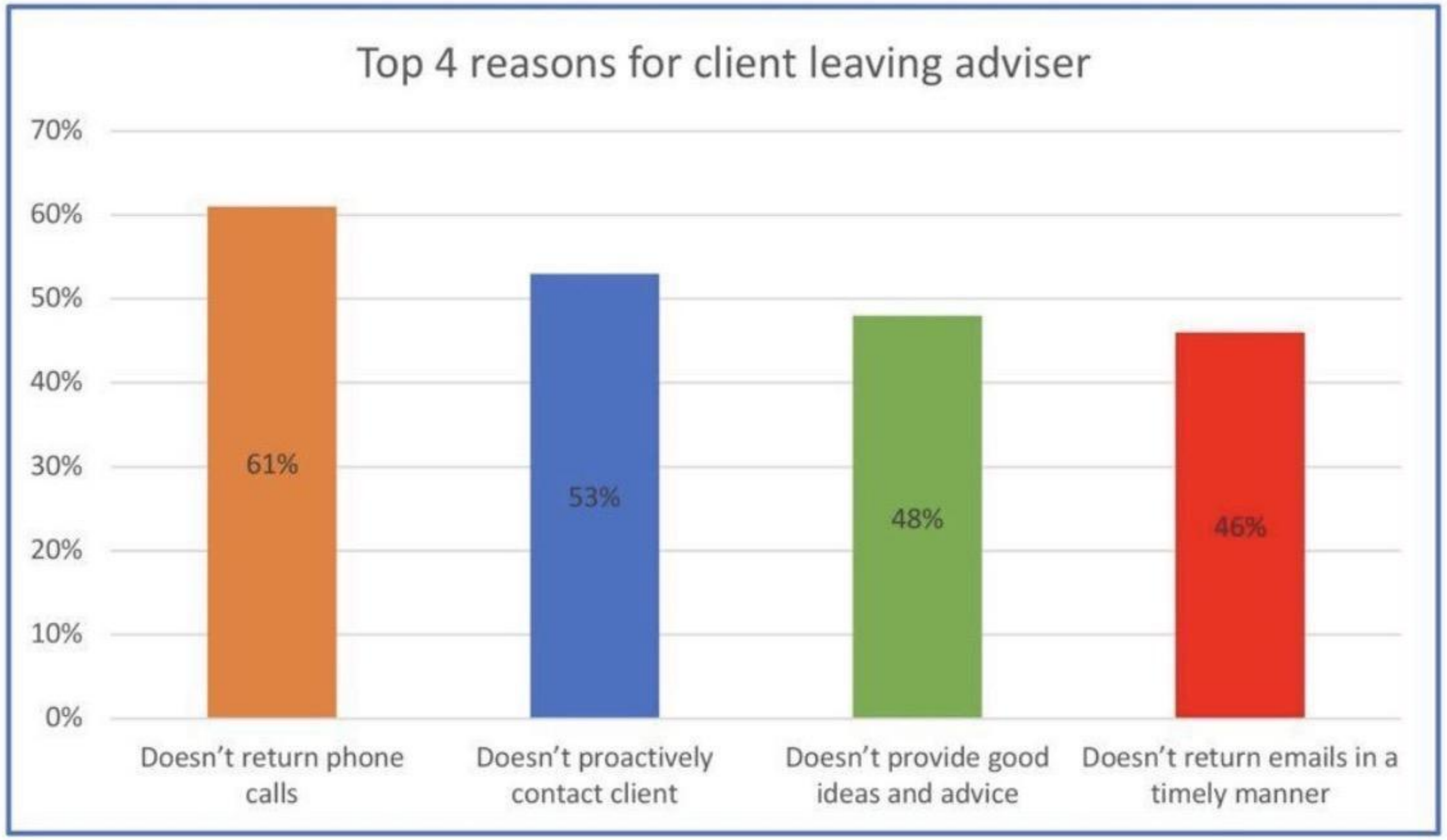
Why clients actually fire their advisor

Not on this list: **investment returns**.

Figure 1: Top 4 reasons for clients leaving their financial adviser



Source: The Spectrem Group

Source: The Spectrem Group

The new standard isn't human vs. AI

✗ ANY ADVISOR COULD HAVE SENT THIS

"Markets experienced volatility this quarter. It's important to stay focused on your long-term goals and remember that time in the market beats timing the market. Please contact our office with any questions."

✓ ONLY YOU COULD HAVE SENT THIS

"Tom — when we built your plan we stress-tested exactly this kind of pullback. You're still on track for the lake house in 2029. You don't need to take any action and neither do we, but if the headlines get loud this weekend, call my cell."

The standard is whether a real person shaped the message for a real audience.

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The Human Advantage Playbook

1 UNDERSTAND (ORION)

Use behavioral insight to recognize what this person needs from a human

2 KNOW (REDTAIL)

Use Redtail to organize the clients, prospects, and COIs who deserve attention

3 DECIDE

A communication, an event, a call, a note, a gift, an introduction — or nothing at all

4 ENABLE (FMG)

Use FMG to make the campaign, event, or follow-up easy to execute

5 HUMANIZE

Add your judgment, point of view, presence, and personal action

6 CONTINUE

Treat every response as the start of a conversation, not the end of a task

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Lean into your human advantage.

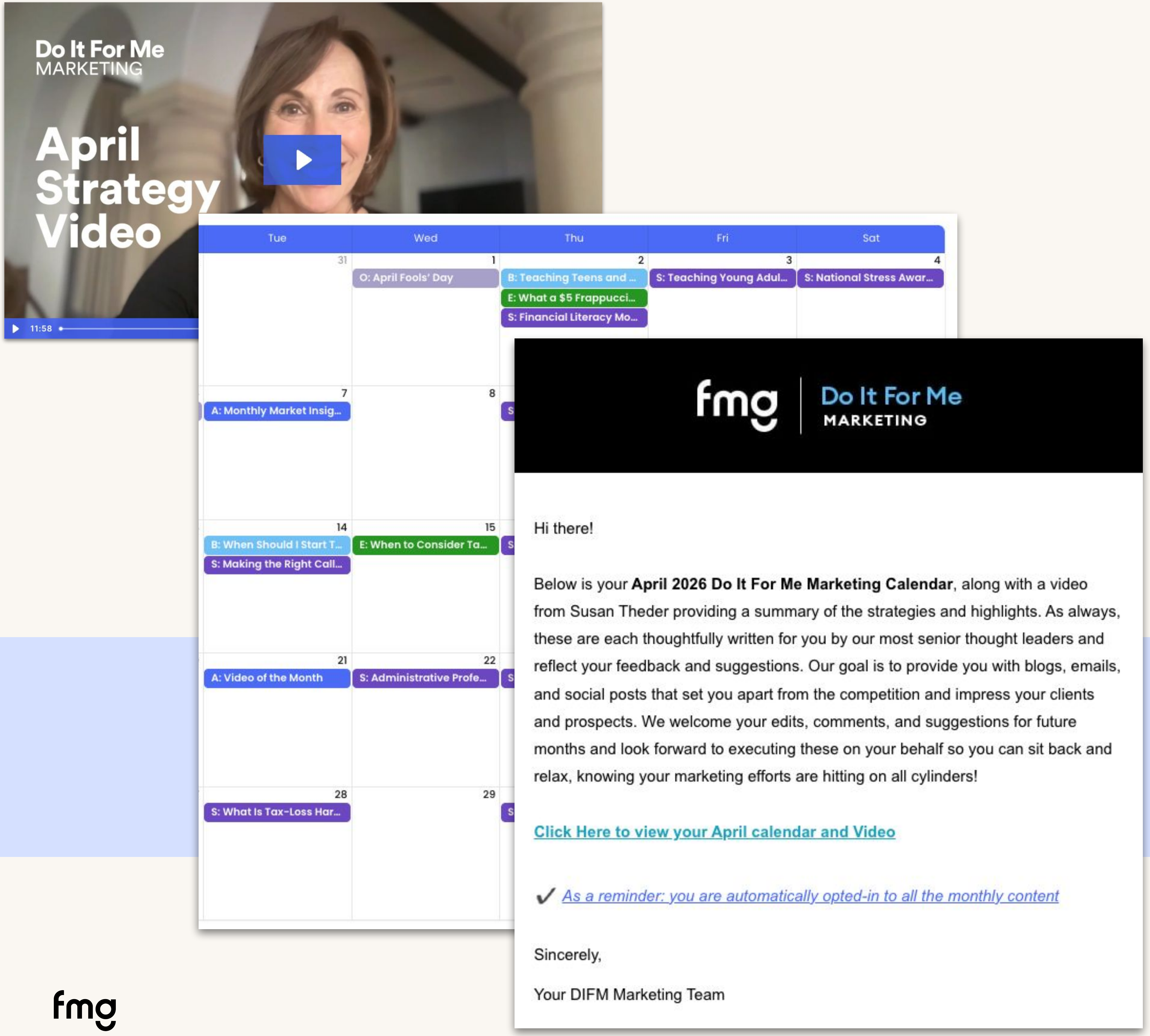
The advisors who win this era won't be the most automated.
They'll be the most human — at scale.

Explore the integration
See how Redtail relationship intelligence connects to FMG execution

Request a demo
A personalized walkthrough for your practice or enterprise

Already a customer?
Review your Redtail connection and audience strategy with your team

Thank you — Susan Theder · Dr. Daniel Crosby · Samantha Russell



Hi there!

Below is your **April 2026 Do It For Me Marketing Calendar**, along with a video from Susan Theder providing a summary of the strategies and highlights. As always, these are each thoughtfully written for you by our most senior thought leaders and reflect your feedback and suggestions. Our goal is to provide you with blogs, emails, and social posts that set you apart from the competition and impress your clients and prospects. We welcome your edits, comments, and suggestions for future months and look forward to executing these on your behalf so you can sit back and relax, knowing your marketing efforts are hitting on all cylinders!

Click Here to view your April calendar and Video

✓ *As a reminder: you are automatically opted-in to all the monthly content*

Sincerely,

Your DIFM Marketing Team

📈 Your Clients Want a Human Overseeing their Finances.

👩‍💻 You Want a Human Overseeing Your Marketing

👈 FMG's "Do It For Me Program" Is Exactly That fmg

Want to see how FMG can help you with all this in 2026?

Book a 20-minute consult →

Questions? Marketing@fmgsuite.com