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2025 Marketing Guide

for Financial Advisors

Save Time, Simplify Marketing, Get Results

In an era when **82% of prospects visit financial advisor websites to learn more about them**,* your digital presence isn't just important – it's essential. Welcome to your comprehensive roadmap for mastering modern marketing in 2025.

Why this guide, why now?

The financial advisory landscape is transforming faster than ever. With digital-first millennials controlling over $30 trillion in assets, advisors need a fresh approach to growth. This guide transforms complex marketing challenges into actionable opportunities across five crucial pillars:

- **Websites**: Create a high-performing digital presence that converts
- **Social Media**: Build authority and attract clients through strategic content
- **Client and Prospect Communications**: Deepen relationships through targeted campaigns
- **Events**: Generate referrals through memorable client experiences
- **Video**: Personalize your brand and reach broader audiences effectively

This isn't just another marketing guide –
it's your competitive edge in a crowded market.

*Paladin Digital Marketing

SECTION 1

Website

Add personality to your website to **stand out from the crowd**

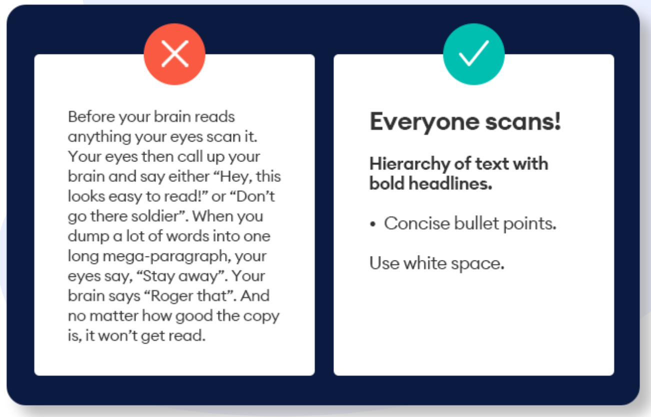
Create a **Website that Converts**

1. **Master the 5-Second Test**
   Create an instantly clear website that communicates who you are, what you do, and your unique value in less than 5 seconds. Use scannable, engaging content that immediately speaks to potential clients' needs.

   Always test your website with someone outside the financial industry to ensure it passes the 5-second clarity test, and effectively communicates your value.

61%

say that if they don't find what they're looking for within 5 seconds, they'll go to another site*



2. **Simplify Navigation**
   Optimize your website structure with **no more than 5 main pages**, with special emphasis on these pages: **Home, About/Team, and Contact/Get Started** (the 3 most visited sections that will likely determine whether a prospect becomes a client).

3. **Audience-Focused Messaging**
   Transform your website copy by focusing on your clients' perspectives and needs. Eliminate industry jargon and utilize behavioral science techniques.

   Replace "We" statements with "You" language that speaks directly to your prospects' desires and challenges, for example: "We provide retirement services" to "Your trusted resource for achieving retirement goals."

4. **Add Engaging Elements**
   Remember, people connect with people. Integrate videos, personal stories, and interactive elements that showcase your personality and help visitors connect with you beyond traditional service descriptions (see video section, page 27).

88%

increase time spent on a website that includes video*

View even more **best practices tips for websites**

*Forbes

Break Out of Boring – A Website Transformation Example

In the competitive financial services market, Cadence Wealth Partners needed a website that truly reflected their unique brand identity and connected meaningfully with potential clients.

So, how do they do it?

Authentic Brand Voice

- Developed a website that showcases the firm's personality
- Integrated humor, expertise, and authenticity into every design element
- Used the "Building a StoryBrand" narrative framework to create compelling content

Strategic Content Design

- Crafted engaging, relatable content that addresses client pain points
- Used conversational language to build trust and familiarity
- Positioned the firm as a knowledgeable guide, not just a service provider

Consistent Visual Branding

- Maintained uniform color schemes and typography
- Reinforced brand recognition across all digital touchpoints
- Created a cohesive and professional online presence

Business Impact

By reimagining their website as a storytelling platform, Cadence Wealth Partners:

- Differentiated themselves in a crowded market
- Established a stronger emotional connection with potential clients
- Transformed their digital presence from functional to inspiring

A website is more than a digital brochure—it's a powerful tool for expressing brand identity and building client relationships.

Website Checklist

Here is a roundup of our best practices to check your own website. Keep it handy all year long to ensure you're on track and getting the most out of your digital presence.

Headline and Introduction

- ○ Write your headline in problem-solution format
- ○ Write an engaging and personality-driven 'About Us' page

Content and Navigation

- ○ Plan your content and navigation around what visitors want (Use no more than 6 navigation buttons)
- ○ Make your copy and site scannable

Calls-To-Action

- ○ Include at least 2 Calls-To-Action on the Home page
- ○ Include a calendar link so visitors can easily schedule a meeting with you (versus only a Contact Us link)

Personal Touch

- ○ Introduce yourself with a video
- ○ Include unique conversation starters on your website (e.g., office dog)

Regular Updates and Social Proof

- ○ Publish new content on your website regularly
- ○ Up your social currency – include Awards, "As Seen In," and testimonials on your site

Additional Resources

- ○ Include an FAQ page on your website

Additional Resources

Website Inspiration:
Website Gallery
Crafting Authentic Messaging Example
Website Makeover Workshop

Additional Tips:
Homepage Design Tips
Powerful Call-to-Action Techniques
Financial Copywriting Secrets

Samantha's **Quick Tip:**

How to actually capture leads from your website.

"I get endless compliments on the site, it's easy for prospects to book meetings, and the Peltoma story is beautifully narrated and visualized. And we went from start to finish in about 3 days.

Rubin Miller
Peltoma Capital Advisors

"We've had an increase in new clients since we launched our site and many tell us that it played a key role in their decision to meet with us. We're also attracting a lot more millennials. We couldn't be more pleased!

Michael Murray
Peabody Wealth Advisors

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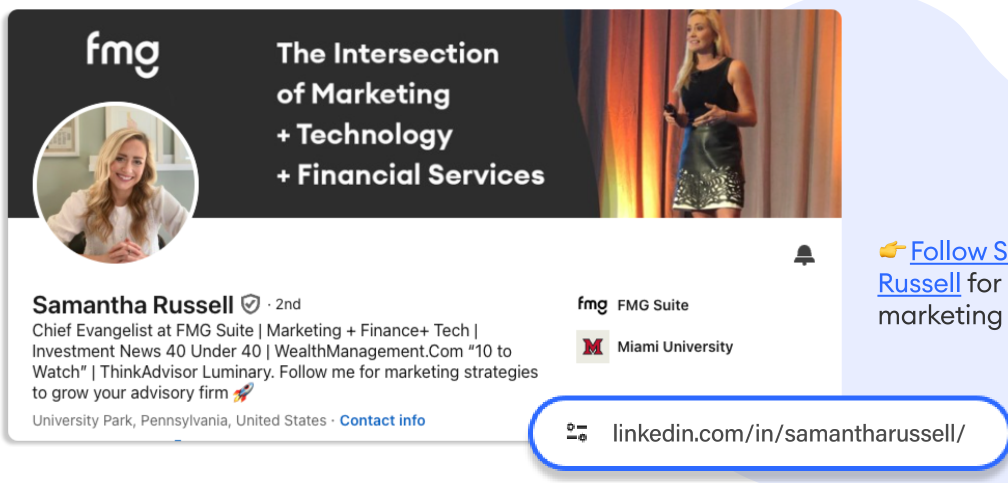
SECTION 2

Social Media

Optimize your LinkedIn presence to **effectively engage a network of prospects**

LinkedIn is a **Dynamic Platform** for Building Meaningful Professional Relationships

1. **Nail Your Profile**
   When potential clients search for you online, your LinkedIn profile is often their first impression. Optimize every element to showcase your professional brand and expertise (see checklist, page 11).



👉 Follow Samantha Russell for daily tips and marketing strategies!

2. **Post Zero-Click Content**
   Create content that provides immediate value without requiring users to click away. Share insights directly in your post, using carousel formats, lengthy text with emojis, and/or embed video to keep your audience engaged and informed.

3. **Understand the Algorithm**
   Content types LinkedIn prioritizes:
   - Native content that keeps users on the platform (text posts, images with text, videos)
   - Carousel and video formats that provide comprehensive information
   - Quality comments over high-volume reactions

   Engagement strategies:
   - Engage with content from clients and prospects you'd like to hear more from
   - Follow creators who consistently generate high engagement
   - Post during peak engagement times for your network

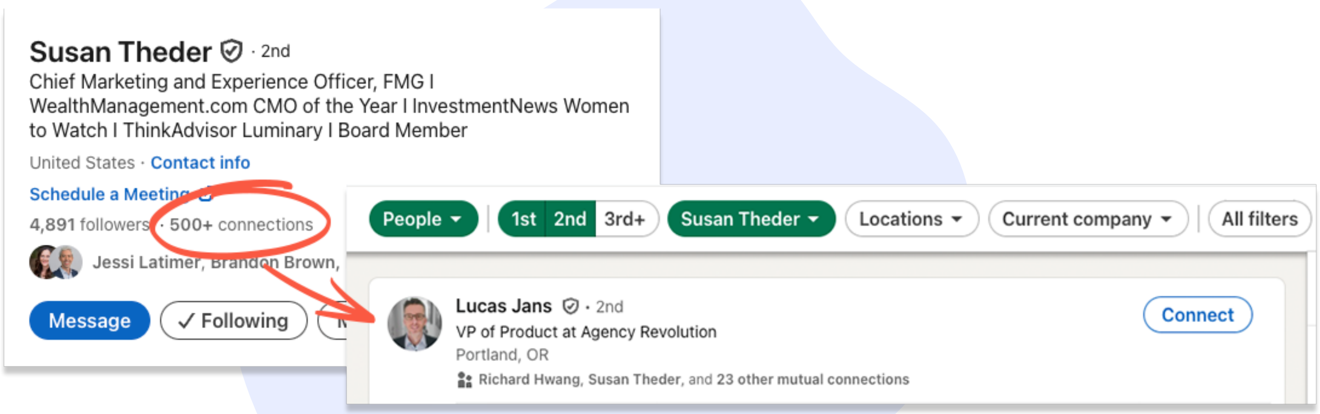
79%
of Americans representing the millennial or Gen Z age groups have gotten financial advice from social media*

*Forbes

4. **Find Meaningful Connections**

Move beyond passive networking:

- Use advanced filters to identify 2nd-degree connections that fit your goals or interests (ex. filter by Company, Location, Alma Mater, or Industry)
- Personalize every connection request with a thoughtful message
- Consider connecting with potential clients, Centers of Influence (COI), local charities or groups and professionals in complementary fields
- Engage with their content before and after connecting to build that online relationship



5. **Follow the 80/20 Rule**

Engage with 4 posts for every post you share

- Craft thoughtful, substantive comments that add value
- Ask open-ended questions that invite discussion
- Respond to every comment on your posts
- Share insights, ask for perspectives, and create a two-way conversation

View more **LinkedIn tips here** to get started

LinkedIn Checklist

Here is a roundup of our best practices to optimize your LinkedIn profile. Keep it handy to ensure you're building a strategic, engaging professional presence that attracts opportunities.

Profile Optimization:

Visuals

- Professional, high-quality headshot (clear, recent, business-appropriate)
- Strategic banner image that reflects your professional brand
- Personalize your LinkedIn URL

Profile Narrative

- Craft a compelling, unique headline that speaks to your value proposition
- Transform your summary into a storytelling narrative
- Add clear, specific call-to-action
- Highlight designations, awards, and achievements
- Feature testimonials
- Verify your account for added credibility

Content Strategy:

Content

- Post Zero-Click Content and mix up the type of content:
  - Personal insights
  - Industry tips
  - Professional achievements
  - Data charts and graphs
  - Educational videos
  - Client success stories

Engagement Approach

- Follow 80/20 Rule:
  - Comment/engage with 4 posts for every post you create
  - Prioritize meaningful, value-adding comments

Advanced Tactics:

Leverage LinkedIn Features

- Use LinkedIn Events for:
  - Webinars, client events, educational seminars
- Implement Sales Navigator for:
  - Advanced prospect searching and tailored outreach strategies

Continuous Improvement

- Monthly analytics review:
  Track post-performance and trends in follower growth or interactions

Time-Saving Resources:

Content Generation Tools

- Third-party tools:
  - Veed.io: Free AI video editor to add text to video, subtitles, and more
  - Authored Up: Tool to create and analyze LinkedIn content to optimize profile performance
  - Kleo: A free browser extension to help consume and create content on LinkedIn

FMG Mobile App is a free AI-driven tool to generate and share content with a simple click of a button.

Learn More >

Daily & Weekly Habits:

Daily | 15 minutes

- Engage network by:
  - Sharing relevant or thought provoking content
  - Leaving thoughtful comments
- Interact with your first AND second-degree connections

Weekly | 5 minutes

- Send connection requests to:
  - Anybody you recently emailed or met with this past week
  - Any networking event connections
- Personalize every connection request with a message

Additional Resources

LinkedIn Trainings:

[Samantha Russell Shares How She Grew to 40K Followers]

[Advanced Strategies + Live Profile Reviews]

[Social Media Mistakes + How to Fix Them]

General Social Media Strategies:

[8 Social Media Post Ideas]

[Social Media Lead Generation]

[Make Your Brand Stand Out on Social Media]

Expand Your Social Media Reach:

[Instagram]

[Facebook]

[YouTube]

Samantha's **Quick Tip:**

[Prime the LinkedIn algorithm] in 10 minutes before your posts go live to boost engagement.

"

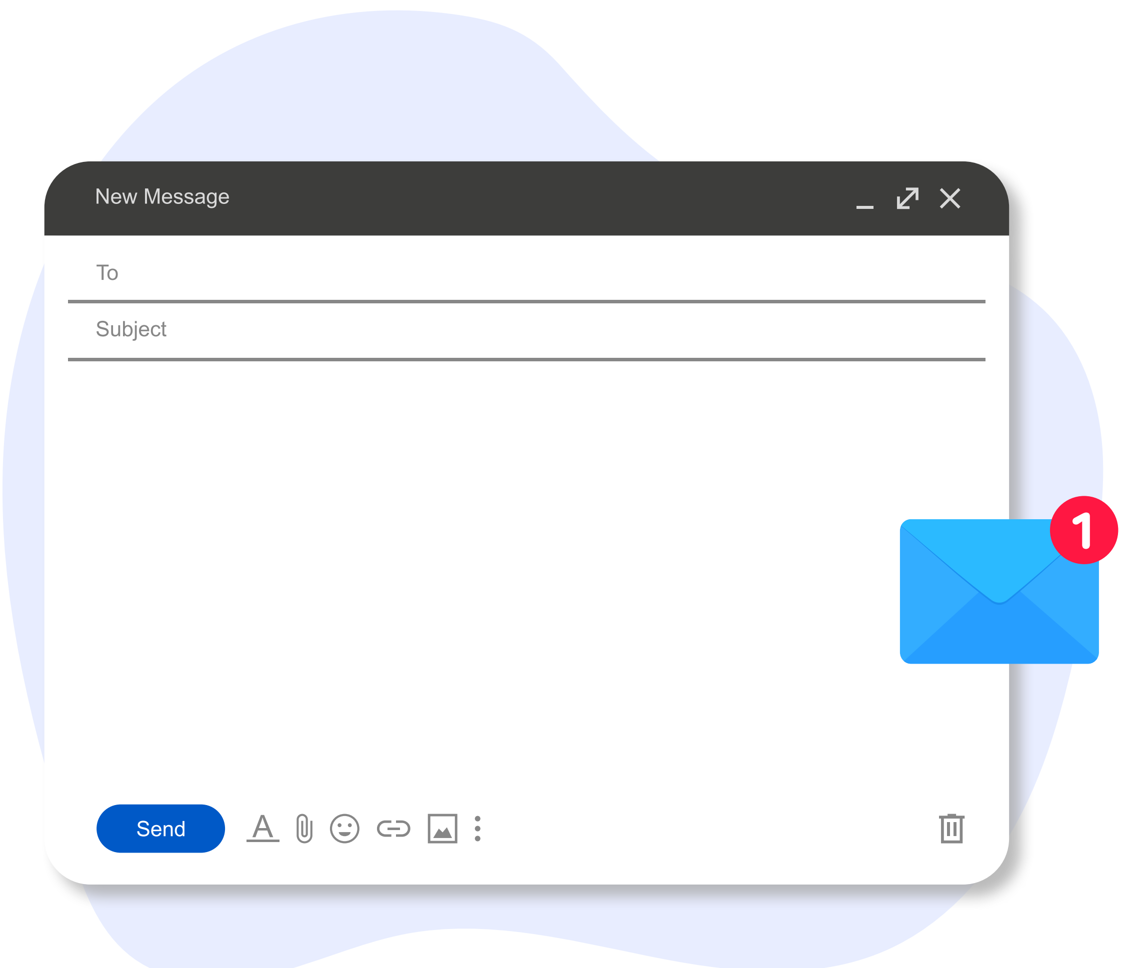
Because of our partnership with FMG's Do It For Me program, the engagement with our content has just about doubled! It seems like weekly we get compliments from clients or prospects about the FMG content the team distributes on our behalf. We've saved time and money, and the results are great! I would highly recommend it

Doug Howes
Sapphire Wealth Management

SECTION 3

Client and Prospect Communications

Strategically mix email and texting to **reach your clients and prospects**



Craft a Communication Strategy that **Engages and Converts**

Email is King

Email remains the most vital channel for client outreach.

Consider sending:

- Email Newsletter: weekly or monthly updates on firm and industry news
- **Automated Drip Series:** from prospecting to new client onboarding, drip emails are important for ongoing education and engagement
- **Timely Content:** provide context during market volatility or breaking news events, offering reassuring strategic communication and reminding clients to stay focused on long-term goals
- **Personalized Lifestyle Content:** track client hobbies in CRM to send relevant, engaging personal content (think: wine, cooking, golf, pickle ball, etc.)
- **Birthdays and Anniversaries:** don't forget about celebratory wishes and significant milestones

75%

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

Texting: Your Communication Accelerator

Email and texting combined can increase customer engagement by 10X**

Use texting for:

- **Rapid Document Completion:**
  - Text reminders get documents returned in 5 minutes (MyRepChat Internal Data, 2024)
  - Follow up on pending paperwork quickly
- **Appointment Management:**
  - Confirm meetings
  - Reduce no-shows
  - Provide easy rescheduling options
- **Instant Communication:**
  - Time-sensitive updates
  - Quick check-ins
  - Annual review scheduling
- **Compliance-Friendly:**
  - Adhere to financial industry regulations
  - Maintain professional communication standards

View even more ways **texting can help you become more efficient**

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*YCharts

**Mail Munch

Communication Strategy Checklist

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

Define Your Communication Channels

- [ ] Email:
  - Ideal for newsletters and comprehensive information
  - Perfect for personalized messages like birthday and anniversary celebrations
- [ ] Texting:
  - Best for quick, personalized messages
  - Great for appointment confirmations and document follow-ups

Segment Your Audience

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

Email Best Practices

- [ ] Craft Compelling Subject Lines
  - Use attention-grabbing, value-driven language

  Leverage free AI tools or subjectline.com for optimization

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

Content Creation

- [ ] Simplicity is Key
    - Write at a 7th-9th grade reading level
    - Use the [Flesch Kincaid score] to test readability
    - Minimize industry jargon
    - Create easily scannable content
- [ ] Clear Call-to-Action
    - Define a single, prominent action for recipients
    - Make the next step obvious and straightforward

Technical Optimization

- [ ] Mobile-Friendly Design
    - Ensure responsive email and text templates
    - Test on multiple devices
    - Use legible fonts and appropriate sizing
- [ ] Performance Tracking
    - Monitor key metrics:
        - Open rates
        - Click-through rates
        - Conversion rates
    - Regularly adjust strategy based on performance data

Communication Frequency

- [ ] Establish a consistent but not overwhelming schedule

    We recommend:
    - 2 blogs/month
    - 4 emails/month
    - 18 Social posts/month:
        - 9 on Observances and Lifestyle Topics
        - 9 on Financial Topics
- [ ] Avoid sending multiple communications on the same day
- [ ] Respect audience communication preferences

Ask clients in a meeting their preferred communication frequency and method and make a note in CRM

Additional Resources

Workshop:
Build a Content Calendar in 45 Minutes

Texting Tips:
Connection Strategies Through Texting
Explore MyRepChat: Your Compliant Texting Solution

Email Insights:
5 Proven Email Subject Lines
8 Email Personalization Best Practices
The Optimal Email Frequency

Samantha's **Quick Tip:**

Get more email opens with personalized content and eye-catching subject lines.

I get thank you calls on the birthday cards sent automatically through my FMG Persona. I've had clients reach out with questions and send notes of appreciation from the monthly newsletters. I don't have time to do the personalized outreach I need to be doing. FMG's marketing team makes me look great!

Mo Rowe
First Financial Group

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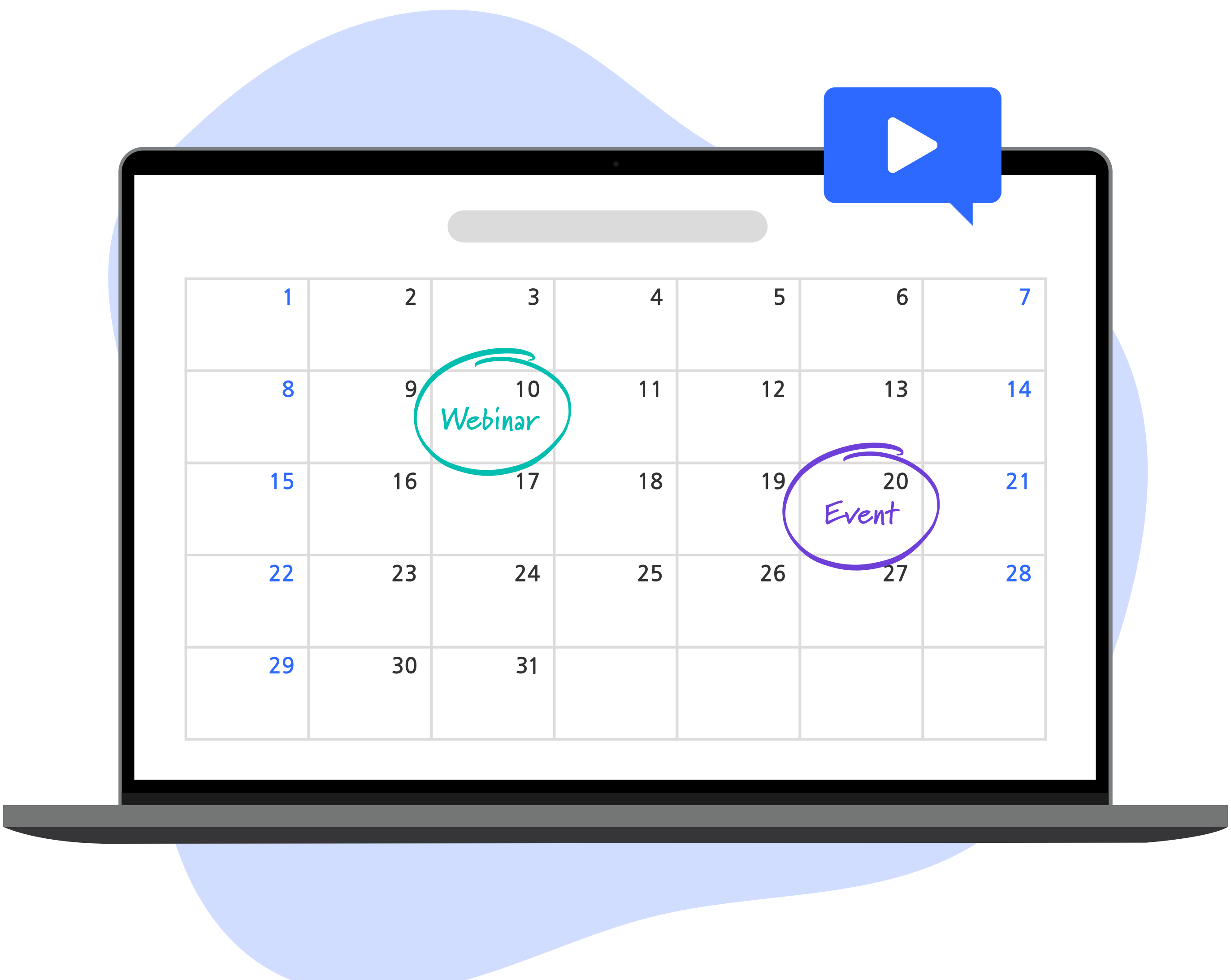
SECTION 4

Events

Generate quality leads and referrals, and show client appreciation, **by hosting engaging events – online or in-person**



An Opportunity to Stand Out – **Tap into Events**

Differentiation is Key

- Events are not just about providing information; they're about **creating memorable experiences**
- Focus on unique, value-added content that **solves real problems** for your clients and prospects

Event Frequency and Planning

We recommend mixing virtual and in-person events and hosting (at a minimum):

- Initial Stage: start with 2 events per year
- Growth Stage: aim for quarterly events (4 per year)
- Advanced Stage: be flexible to add timely events on trending topics to your event schedule

Virtual Webinars: **Maximizing Engagement and Lead Generation**

Utilize an educational, online seminar format to:

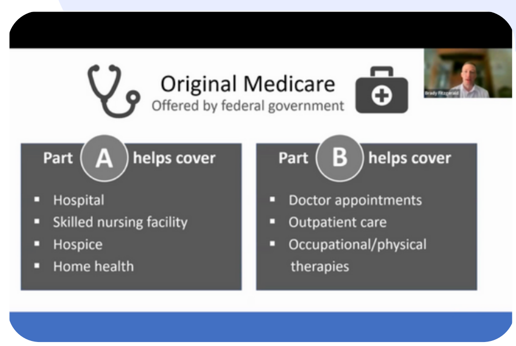
- Generate high-quality leads
- Provide scalable content with high Return on Investment (ROI)
- Build brand awareness and establish authority
- Offer accessibility and convenience

23%

of firms are currently using webinars*

Webinar Tips

- Partner with Subject Matter Experts (SMEs) for a joint presentation
- Collaborate with Centers of Influence (COIs) to expand reach, add credibility and cross-promote
- Add fun giveaways or prizes during the live event to encourage attendance and participation
- Repurpose the content and cut video snippets to use all year long on social media



Medicare 101 Webinar

*WealthManagement.com

In-Person Events: **Building Meaningful Connections**

Networking in person is a powerful way to:

- Create memorable experiences attendees will want to share
- Engage with clients and prospects on a personal level
- Demonstrate expertise through direct interaction
- Encourage networking and referrals
- Deepen client relationships across generations – don't forget to invite clients' children

16%

of advisors focus on hosting in-person events*

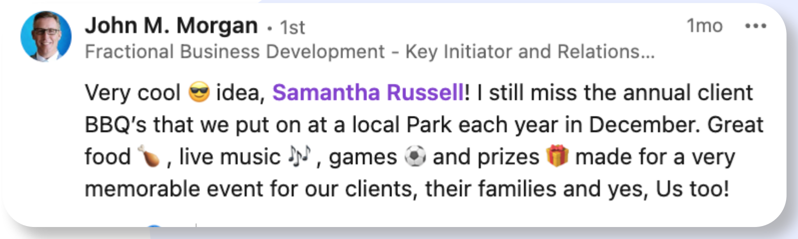
Valentine's Day Luncheon

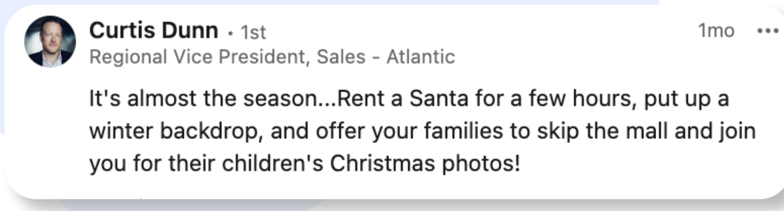
To kick off our 2024 events, Cox Financial Group held a luncheon on Valentine's Day for our "Single and Single Again" ladies. We fellowshipped over brunch at Sunny Street Cafe in Willow Park and played some "love themed" Trivia!

See an example timeline of events >

*SmartAsset

Advisor Examples





Seasonal Event Inspiration

☀️ **Summer**

- Yappy Hour Event
  - Pet-friendly gathering with drinks and social activities
  - Showcases your approachable, community-focused brand
  - Allows clients to bring the entire family (including furry members)

❄️ **Winter**

- Winter Wellness Seminar
  - Partner with a local health professional
  - Focus on financial and personal wellness during the busy holiday season and New Year
  - Provide a complimentary chair massage

🍁 **Fall**

- Family Photo Experience
  - Book a local photographer
  - Provide complimentary mini photoshoots for the whole family
  - Don't forget (non-messy) snacks, especially for the kids

🌱 **Spring**

- Financial Literacy Family Day (aligned with Financial Literacy Month in April)
  - Educational workshops for different age groups
  - Kids' financial games and activities
  - Send home a book or keepsake

Get more **event ideas** here!

Event Checklist

Follow these steps to ensure you're creating memorable, strategic experiences that drive business growth and client engagement.

Pre-Event Planning

- ○ Define clear event objectives (lead gen, education, client appreciation, engagement)
- ○ Choose your event type: virtual or in-person
- ○ Identify target audience and relevant topic
- ○ Choose the date/time, select a location, set your budget and define your goals

Event Design

- ○ Develop agenda and presentation materials
- ○ Identify potential speakers/strategic partners:
  - Collaborate with complementary businesses
    - Virtual: Local estate planning attorneys, real estate agents, tax professionals
    - In-Person: Local wineries, yoga studios, wellness centers

Marketing and Promotion

- ○ Design event branding
- ○ Create a registration landing page
- ○ Develop an email marketing campaign
  - Initial invite (2-3 weeks prior)
  - Reminder emails (1 week, 1 day, day of event)
- ○ Post on social media + create a LinkedIn Event listing
- ○ Reach out to potential partners/influencers
- ○ Send personal invitations to high-value prospects

To build excitement, use language such as: *"Several attendees have asked about bringing guests. RSVP now to secure your spot and guest invitation."*

FMG's Event Tool makes event management easy! Enjoy the flexibility of pre-built templates and customizable templates and content, and harness the power of automation and registration tracking.

Learn More >

Logistical Preparation

- ○ Virtual:
  - Test webinar platform, audio and video equipment
- ○ In-Person:
  - Venue confirmation and technical set up
  - Registration process
    - Digital or physical sign-in
    - Don't forget name tags!

Event Execution

- ○ Arrive early
- ○ Always engage audience through:
  - Virtual: Q&A interactions and chat
  - In-Person: use first name and facilitate networking
- ○ Capture photos/testimonials

Post-Event Follow-Up

- ○ Send personalized thank-you emails
  - Virtual: send a replay with summary
  - In-Person: share event photos
- ○ Offer a follow up meeting
- ○ Conduct feedback survey
- ○ Nurture leads with relevant content

Performance Evaluation

- ○ Analyze attendance and engagement metrics and feedback
- ○ Identify improvement opportunities for future events!

Don't Forget to Repurpose Your Event

- ○ Transcribe a virtual webinar
  - Create short clips for YouTube and social media (plus video transcript for SEO)
  - Develop related blog post
  - Update landing page with replay
- ○ Post in-person event pictures:
  - On your website
  - On social media

Additional Resources

Pro Tips:

Event Marketing Essentials with FMG

5 Pro Tips for Webinar Success

Organic Growth Workshop

Inspiration:

Memorable Client Events

Samantha's **Quick Tip:**

Make your event a success

"

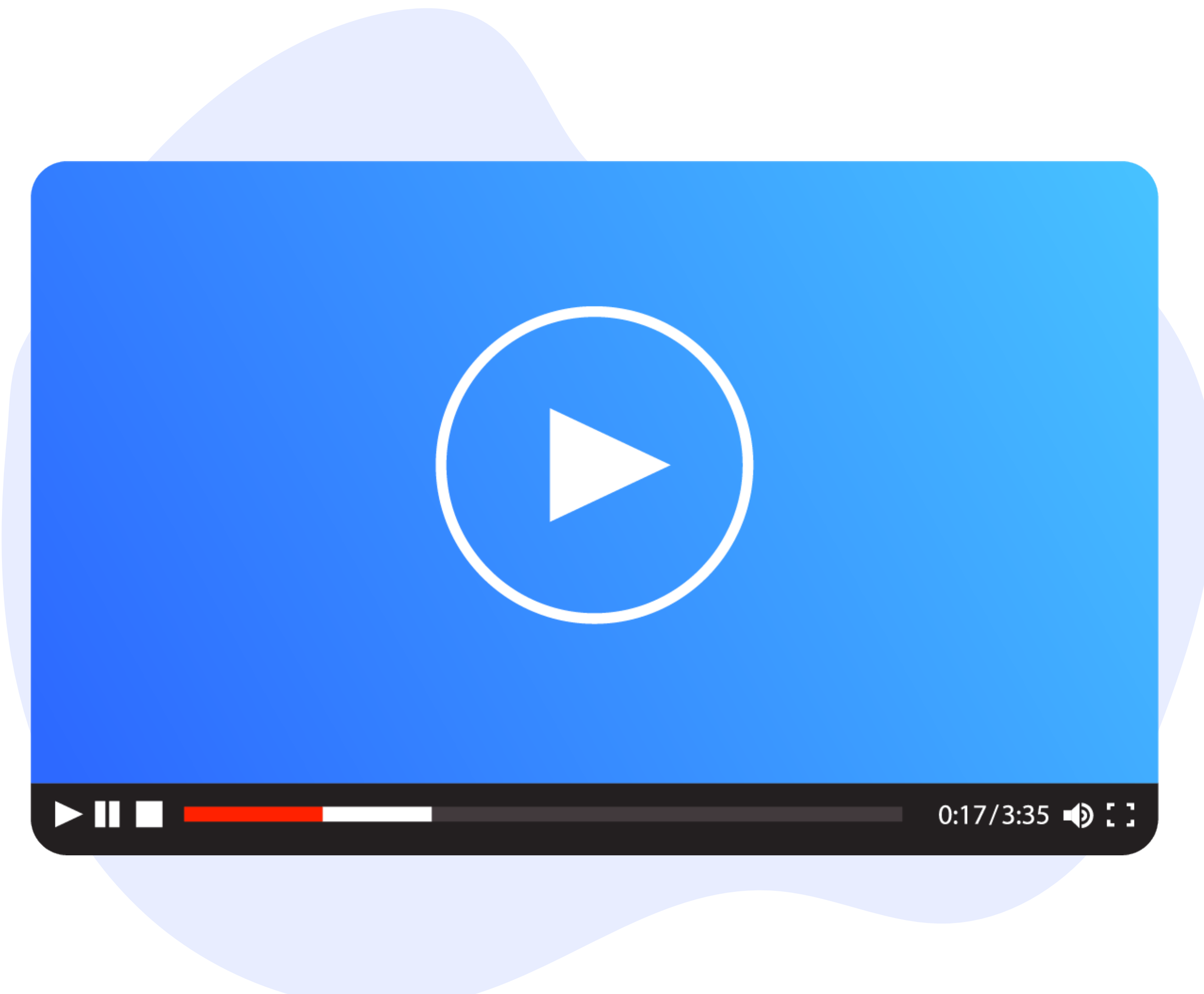
FMG's Event Tool has been a game-changer for promoting our client events. We love that it's so easy to use and creates a landing page to capture RSVPs all within the FMG platform. We are getting fantastic response rates; it saved us time with compliance, and having everything tied in with our website makes our promotions work even better!

Kevin Blondina
B & D Group

SECTION 5

Video

Use videos to **engage with your audience personally and build trust**



Amplify Your Marketing Efforts with Compelling Video

79%

of consumers would rather watch a video about a product than read about it*

Enhance regular email communications

Incorporating video leads to a **300% increase in email click-through rates.***

- Add a personal message
- Use video content, such as Monthy Market Insights or Video of the Month to share expertise
- Add a video synopsis with your commentary of the content
- Recommended video length: 30-60 seconds

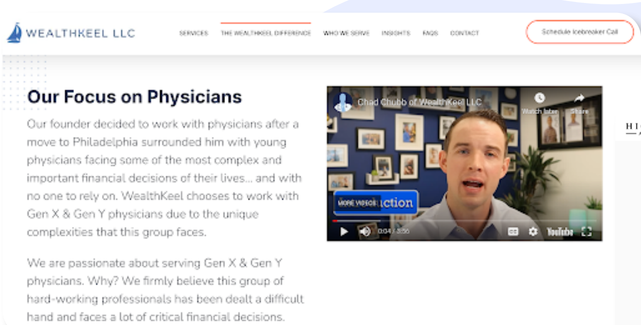
Increase social media **engagement by 400%****

- Give quick tips on a financial topic
- Add timely market insights
- Don't forget to weave in personal videos - events, travel updates and showoff family/pets (these often get the highest engagement)
- Recommended video length: 30-60 seconds for homepage, 1-2 minutes for "Meet the Team" and Vlogs

Bring life to your website

Incorporating video on landing pages results in an **80% rise in conversion rates.***

- Add a firm introduction on your homepage
- Develop individual "Meet the Team" videos on "About Us" page
- Implement a video blog (Vlog) section with insights and financial planning tips
- Recommended video length: 30-60 seconds



Introduction to Firm

Video Blog (Vlog)

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*Animoto
**Insivia

Essential Video Content to Record

At minimum we recommend these three videos

Founder's Story: personal journey and professional motivation

- Builds emotional connection with potential clients
- Demonstrates authenticity
- Helps prospects understand your unique value proposition

Speak genuinely and from the heart. Don't overproduce–authenticity resonates more than perfection

Client Experience Walkthrough: demystify your process:

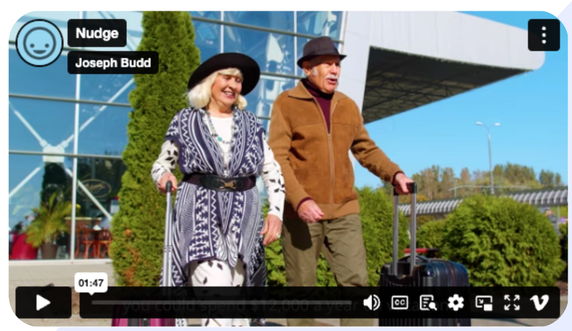
- Explain what prospects can expect
- Focus on client needs, not just services
- Create a post-discovery meeting touchpoint

Use "You" language to directly address prospect concerns and goals.

Nurture/Reminder Video: stay top of mind:

- Incorporate humor or unexpected approaches
- Keep tone light and approachable
- Subtly remind prospects of your available

Experiment with different styles to find what feels most authentic to you.



95%

Users will retain 95% of a message watched on video as **opposed to only 10% read in text***

*Insivia

Video Marketing Checklist

Keep this checklist handy to ensure you're creating high-quality, impactful videos that showcase your expertise and connect with your audience.

Camera

- ○ Smartphone or Webcam
  - Optional: tripod for stable recording

Location

- ○ Quiet, minimal background distractions, natural light source (near a window)
- ○ Professional, clean background (but don't skimp on any personal touches - people love seeing art pieces, autographed jerseys or family photos in the background)

Content

- ○ Script development
- ○ Identify any graphics/pop-ups to include

Recording Best Practices

- ○ Business casual attire (or what you'd wear in a client meeting)
- ○ Speak conversationally
- ○ Use storytelling techniques (pretend you're talking to a friend)
- ○ PRACTICE and re-record as many times as you'd like (nobody needs to know how many takes it took)

Editing

- ○ Tools like Veed make it really easy to edit
- ○ Quick edits to
  - Remove dead space at beginning/end
  - Check audio levels
  - Add subtitles
  - Add any visual elements

Post-Production

- ○ Don't forget to submit to compliance and obtain necessary approvals
- ○ Create video thumbnail and write a 1-2 sentence description
- ○ Distribute:
  - YouTube
  - Website
  - Email newsletter
  - Social media

FMG's Video Email Widget allows you to upload a video straight to an email, no need to host it elsewhere, create a thumbnail or any extra steps!

Learn More >

Additional Resources

Video Trainings:

[Video 101: The Proven, Step-by-Step Playbook]

[The Power of Video Marketing]

Video Strategy Deep Dives:

[Using Video for Lead Generation]

[4 Video Marketing Ideas]

Have you Considered Podcasting?

[5 Steps to Getting Started]

[Podcasting Success Checklist]

Samantha's **Quick Tip:**

[Start your video with a hook]

❝

Somebody came back to me and said 'you know your high school looks just like my high school!' and another said 'I had this happen in my family when I was growing up and I understand what you're talking about'...There's an emotional connection that you make with folks that watch this [personal story video]. It's an interesting way to have a personal connection with others

Joe Budd
Budd Wealth Management

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Marketing Simplified: **Your Path to Growth**

This guide isn't just a collection of tactics—it's your comprehensive blueprint for sustainable growth in 2025 and beyond.

We covered:

- **Digital Presence:** From websites that convert to LinkedIn strategies that build authority
- **Communication Mastery:** Personalized outreach that keeps you top-of-mind
- **Engagement Strategies:** Events and video content that create meaningful connections

Free Consultation Offer:

Start transforming your marketing with a free 20-minute consultation tailored to your goals. We'll dive into your specific goals and show you exactly how we can help you achieve them—with as much or little effort on your part.

Schedule Now