



From Conversation to Content:

AI-Powered Client Engagement for Modern Advisors

Speaker Overviews

 zocks |  fmg



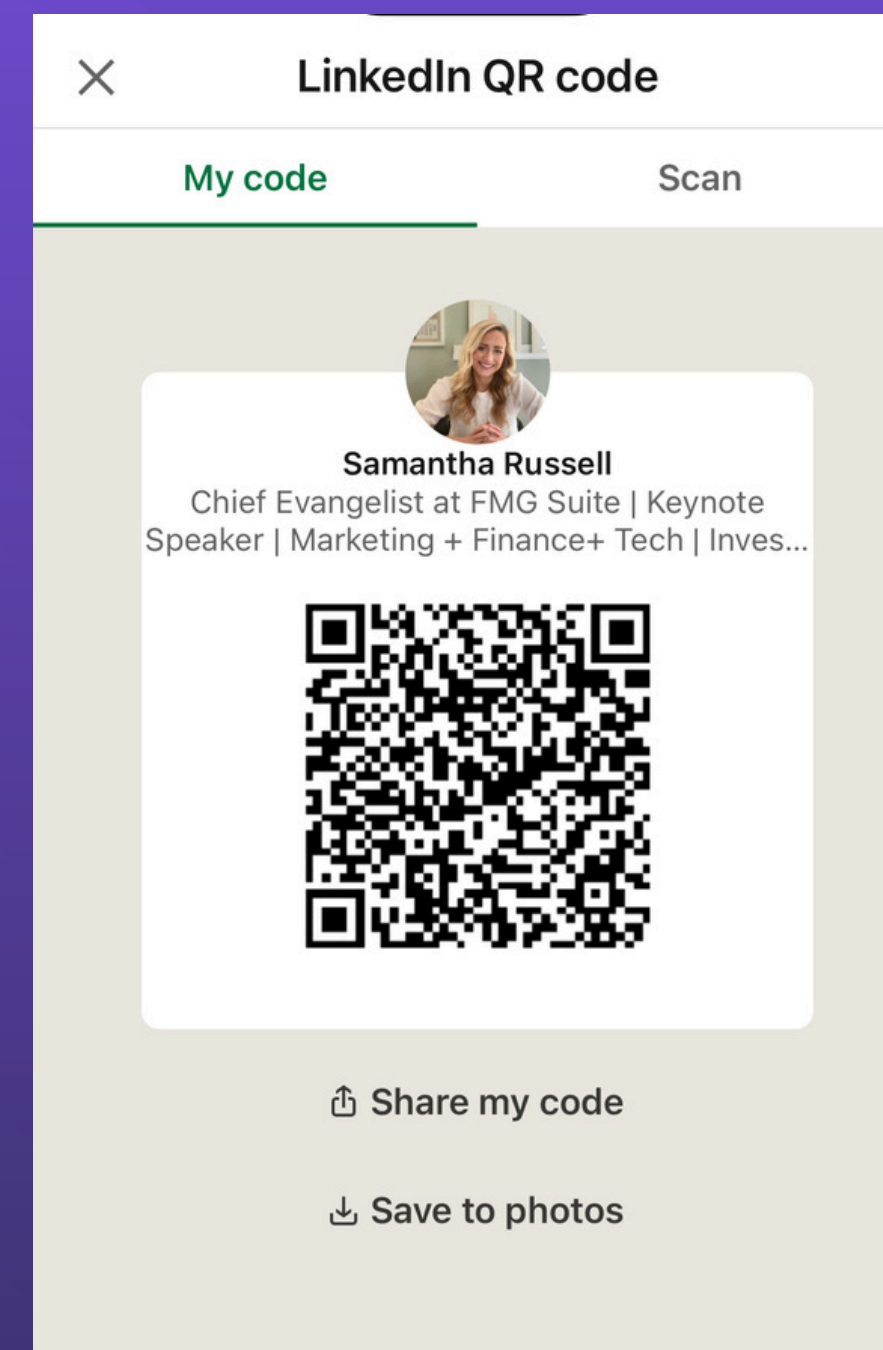
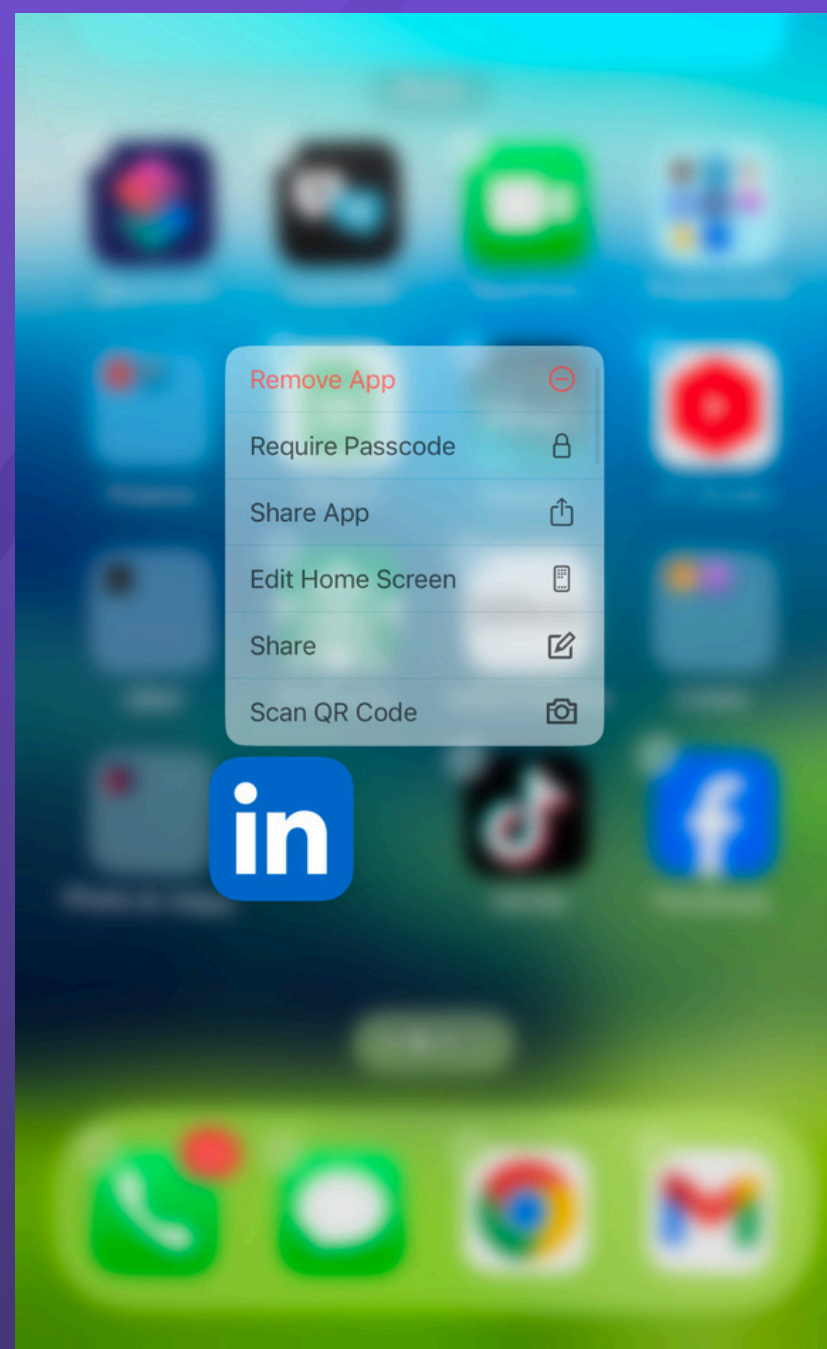
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Let's Connect on LinkedIn!

(Plus a Tip for all of You!)



Deep Client Segmentation for Targeted Content



Understanding Client Personas

- Analyze client data and generate comprehensive profiles
- Identify key demographics, behaviors, and preferences to create tailored content



Enhanced Communication Strategies

- Leverage segmented insights to craft personalized messaging
- Foster stronger relationships through bespoke content that resonates with unique interests and needs

Family Tree

Luke Hart
Son

- Luke is 17 years old.
- He is currently in high school and involved in sports and activities.
- His parents, John and Michelle Hart, are starting to think about his college education.

Rebecca Hart
Daughter

- Rebecca is 15 years old.
- She is also in high school and participates in sports and activities.
- Her parents are John and Michelle Hart.

Personal Information

- John and Michelle Hart like to ski and have a condo at a ski resort in Mammoth
- Son Luke is 17 years old and daughter Rebecca is 15, both in high school and play soccer
- John and Michelle like golf but say they aren't very good

PAST MEETINGS (1) CLIENT PROFILE

FAMILY
MONEY
OCCUPATION
RECREATION

Recreation

Recreation Client Profile

Charities

Support Activities

- Church

Updated at: 03/04/2025, 8:41 AM Type: meeting Show history

Sports and Recreation

Sports Played

- Skiing

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Personal Hobbies and Interests

Hobbies

- Golf

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Interests

- Spending time with family
- Church activities

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03/04/2025, 8:41 AM

Responding to Market Volatility Situations

Content Creation in Real-Time

- Leverage AI to produce educational materials or insights that directly address current market conditions
- Content types: newsletters, blog posts, video updates, and social media posts

Best Practices

- Outline strategies for maintaining client trust during turbulent times by delivering prompt, well-informed content
- Frame discussions around risk management and portfolio recovery strategies

PAST MEETINGS (1)

CLIENT PROFILE

FAMILY

MONEY

OCCUPATION

RECREATION

Money

Money Client Profile

LAST CHANGED
03/04/2025, 8:42 AM

Financial Goal

Goal

Retirement

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Priority

High

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Financial Goal

Goal

Funding children's education

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Priority

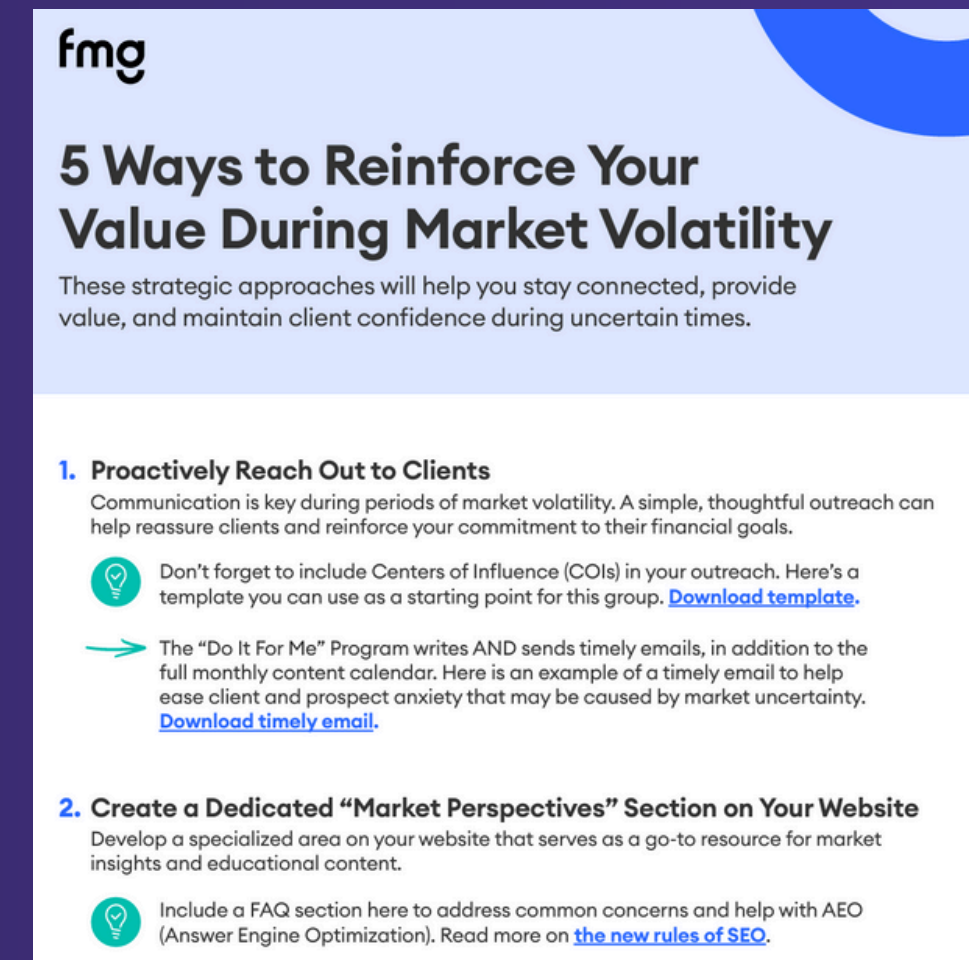
Medium

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Market Volatility Communication

Best Practices

1. Proactively Reach out to Clients
2. Create a dedicated “Market Updates” section on your website
3. Host Market Update Webinar
4. Make Videos for social
5. Offer Family Financial Strategy Sessions



Get FMG's Market Volatility Toolkit:
Scan the QR Code



Enterprise-Level Benefits

(Training, Performance Insights)



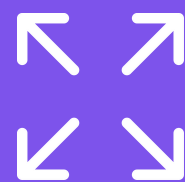
Comprehensive Training

- Identify knowledge gaps and create targeted training initiatives



Performance Insights

- Track metrics like talk time to evaluate performance
- Use analytics to inform coaching conversations and drive strategy



Scalability and Efficiency

- Enhance overall operational efficiency, enabling advisors to focus more on client relationships and less on administrative tasks

The screenshot displays the Zocks application interface. On the left is a dark sidebar with navigation options: MEETING HUB (Upcoming, Past Meetings, In Person Meeting, Setup), ANALYTICS HUB (Dashboard), LIBRARY (Contacts), and ACCOUNT (Profile settings, Manage team, Plan, Help Center). The main content area is titled 'MEETING SUMMARY' and shows details for a meeting with 'Nate Harrison Check-in Call' on 'Apr 10, 2024' from '9:00 AM - 9:11 AM' with '2' participants. A table lists participants: Nathan Harrison (57% completion) and Cade Shatzer (43% completion). Below the table, the 'Meeting Purpose' is described as discussing Nate Harrison's financial situation, focusing on retirement planning, education funding, and estate planning. The 'Client Information' section notes that Nate Harrison is a tech employee and business owner earning \$150,000 annually. A green box highlights the participant table.

CLIENTS (1)	FINANCIAL ADVISORS (1)
Nathan Harrison	Cade Shatzer
57%	43%

FMG Marketing Guide

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All of Samantha's Best (Actionable!) Marketing Tips
Across Five Crucial Pillars:

1. Social Media
2. Website
3. Email & Text Communications
4. Events
5. Video



Questions?

Contact srussell@fmgsuite.com



Thank You!

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