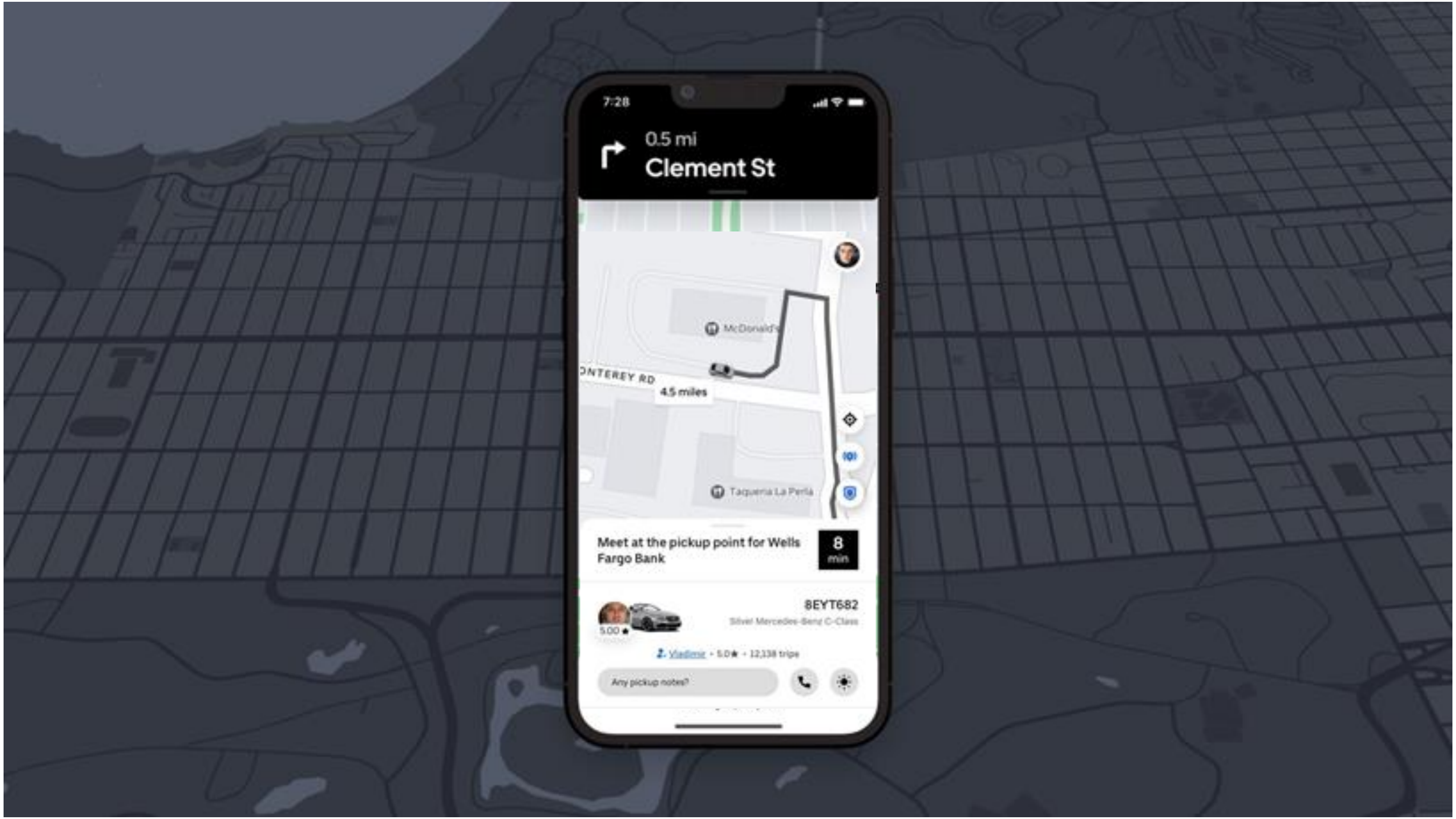
# Marketing Secrets of Hyper Growth Advisory Firms

## Practical Tips To Help You Build Your Brand, Find your Fans, and Grow Your Business.

Presented by:
**Samantha Russell**
Chief Evangelist
FMG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Meet at the pickup point for Wells Fargo Bank
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Any pickup notes?

“The Uber map is a psychological moonshot, because **it does not reduce the waiting time for a taxi but simply makes waiting 90% less frustrating**” - Rory Sutherland

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# 01

## They understand how consumers find an advisor today has drastically changed


MARKETING MIX
EMAIL
LANDING PAGES
WEBINARS
INSTAGRAM
INSTAGRAM
LINKEDIN
BLOGS
RELATIONSHIP MARKETING
SEO
RELATIONSHIP MARKETING

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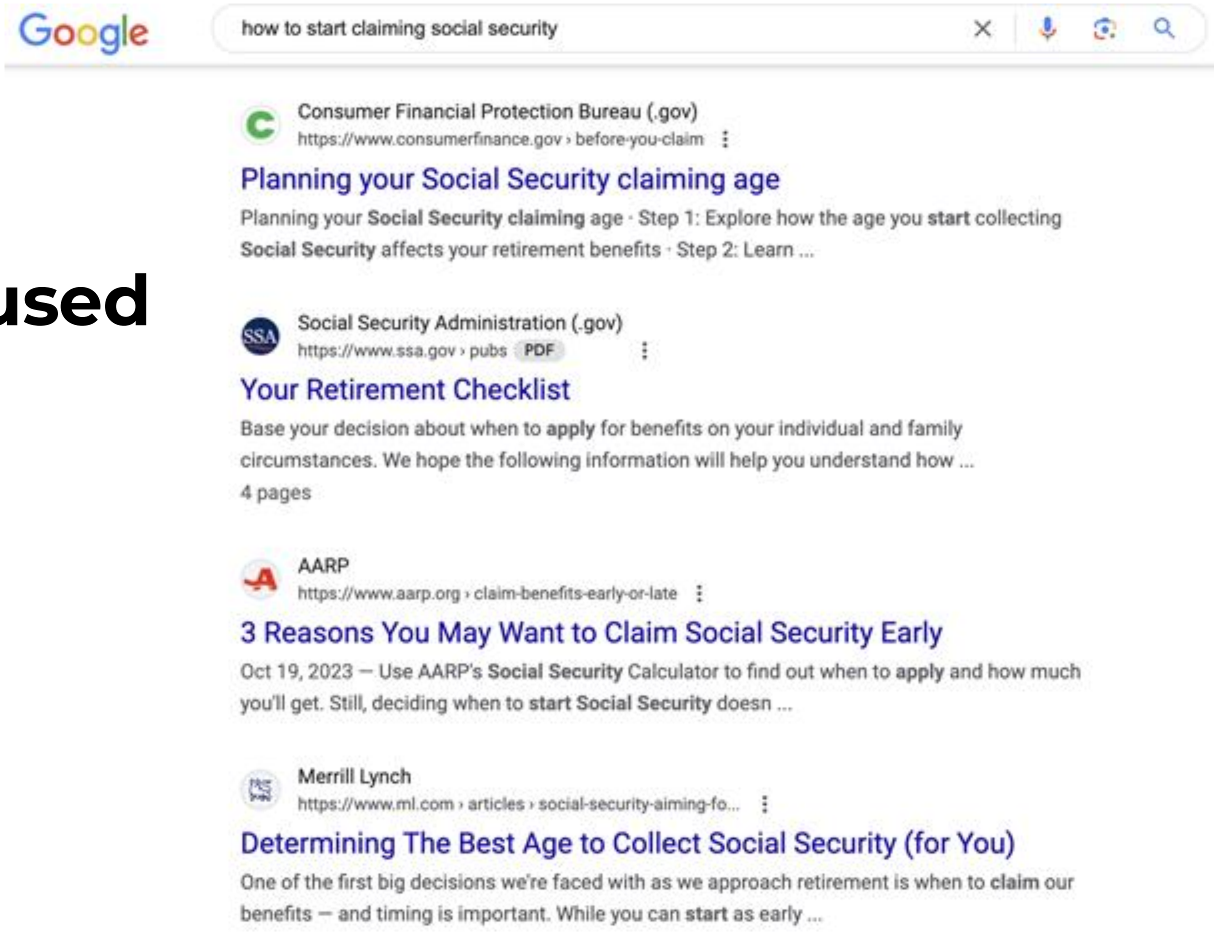
# How searches used to work...

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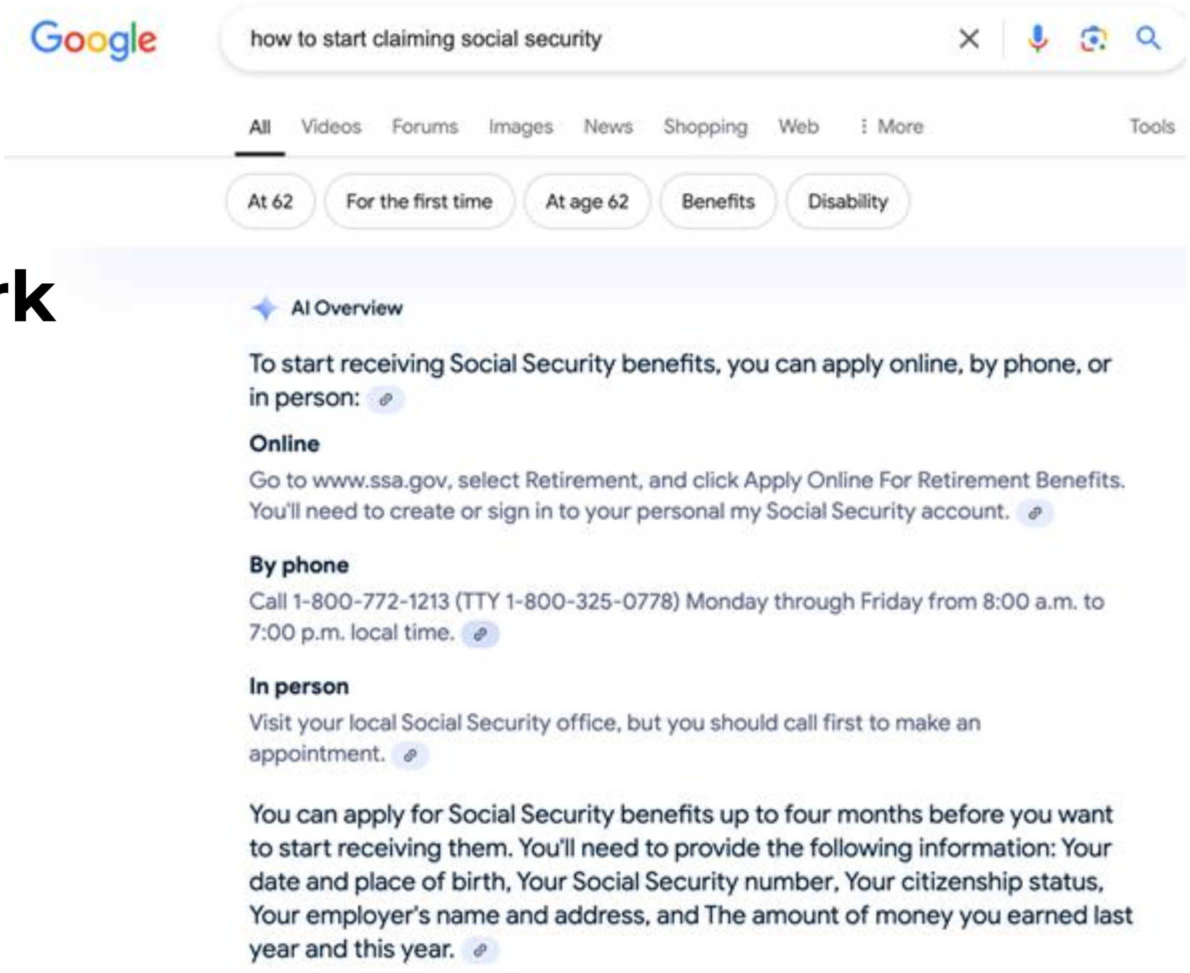
# How they work today...



# AI tools ask follow-up questions to be more helpful!

how do I start claiming social security?

To start claiming **Social Security benefits**, here's a step-by-step guide—assuming you're referring to the **United States Social Security system**. Let me know if you meant a different country.

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### ✅ Eligibility Basics

You can start receiving:

- **Retirement benefits** as early as age **62**, though full benefits kick in at **full retirement age** (66–67, depending on your birth year).
- **Spousal or survivor benefits** based on a spouse's earnings.
- **Disability benefits** if you are unable to work due to a qualifying medical condition.
- **SSI (Supplemental Security Income)** if you have very limited income/resources.

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### 📝 Steps to Apply for Social Security Retirement Benefits

Would you like guidance on **spousal, disability, or survivor benefits** instead—or help estimating your monthly amount?

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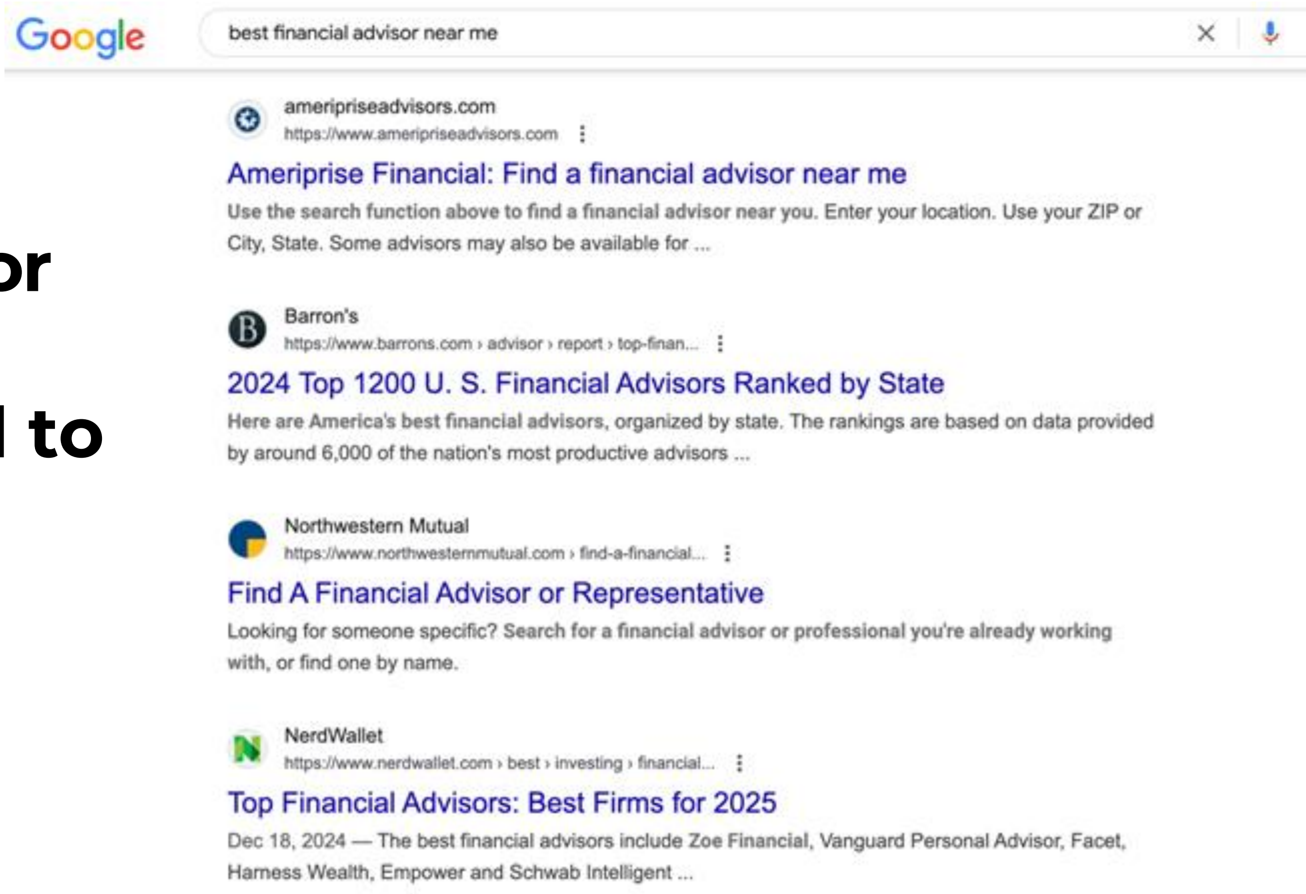
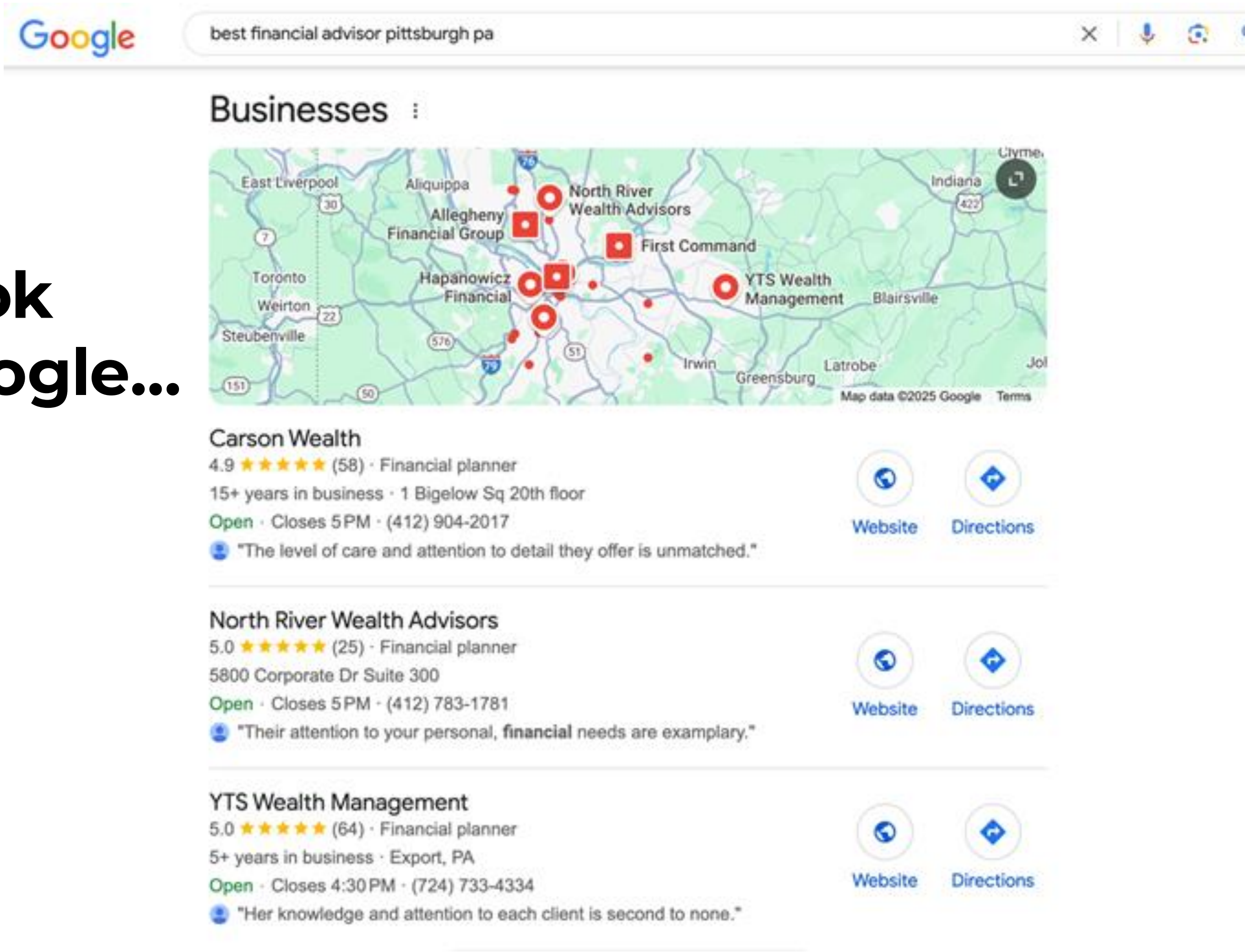
# How Results for “Best advisor near me” used to look...



# How they look Today on Google...

*What do all of these have in common?*



# How they look today on ChatGPT...

ChatGPT

who are are the best financial advisors in pittsburgh, pa

Pittsburgh, Pennsylvania, boasts a diverse array of financial advisory firms catering to various financial needs. Here are some notable financial advisors in the Pittsburgh area:

**Legend Financial Advisors, Inc.**
Pittsburgh, PA
Established in 1993, this firm offers comprehensive wealth management services, including financial planning, investment management, IRA rollovers, and 401(k) management. They focus on creating personalized financial plans based on clients' expenses and risk tolerance. EXPERTISE.COM

**JFS Wealth Advisors**
Pittsburgh, PA
Founded in 1986, JFS provides integrated investment strategies and financial solutions to individuals, businesses, and families. Their services encompass retirement planning, estate planning, and investment management. EXPERTISE.COM

**Fragasso Financial Advisors**
Pittsburgh, PA
Recognized by Forbes and Barron's, Fragasso offers a range of services, including income tax reduction strategies, life insurance, long-term ca ost analysis, estate planning, and business

# Have you gotten a lead from ChatGPT?

**Ryan Kus** · 1st 17h ···
President | Financial Planner | Podcaster...

Yes. We had our first lead from Chat GPT. Yesterday prospect contacted us and he found us on Chat. Fun stuff!

Like · 1 | Reply

**Cathy Curtis, CFP®** · 1st 17h ···
Empowering High Net Worth Single Women to...

a great prospect, now client found me using ChatGpt!

Like · 2 | Reply · 3 replies

**Matt Hylland** · 1st 1w ···
Flat-Fee, Fee-Only, Fiduciary Financial Advisor | Financial Plann...

Just had our first as well! Not sure how/why we are included, but won't complain I guess. We have a few YouTube videos and blog posts that get OK traffic on the topic. But was a surprise for sure

**Chelsea Ransom-Cooper, CFP®** · 1st 2w ···
Leading the Next Generation of Diverse Financial Planner...

Yes! This happened to us and they shared the prompt!

# What factors impact getting shown by Google or ChatGPT to users?


Source: Neil Patel Digital

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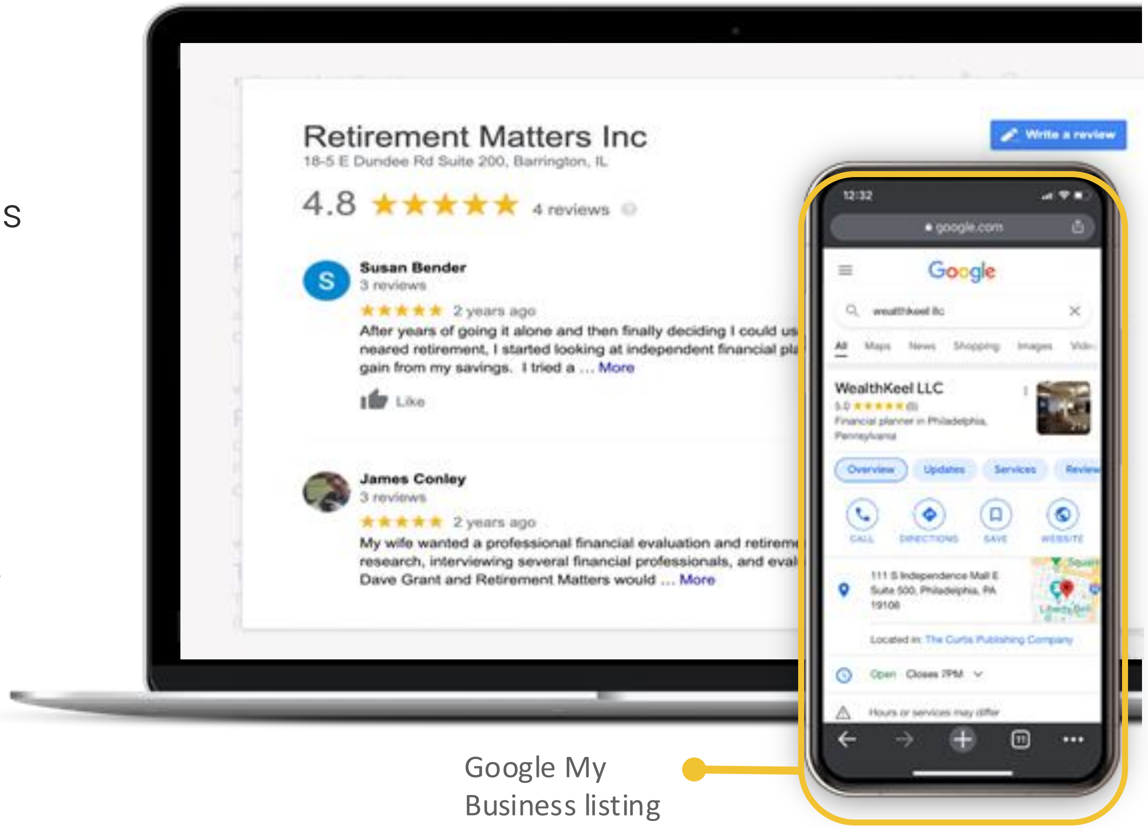
# Google Reviews = The New Referrals

## Why do they matter?

✅ One review = read 100s or 1000s of times

✅ If someone Googles you, any reviews will show up prominently

✅ When You Get More Reviews… You Rank HIGHER in Local Searches and AI




Google My Business listing

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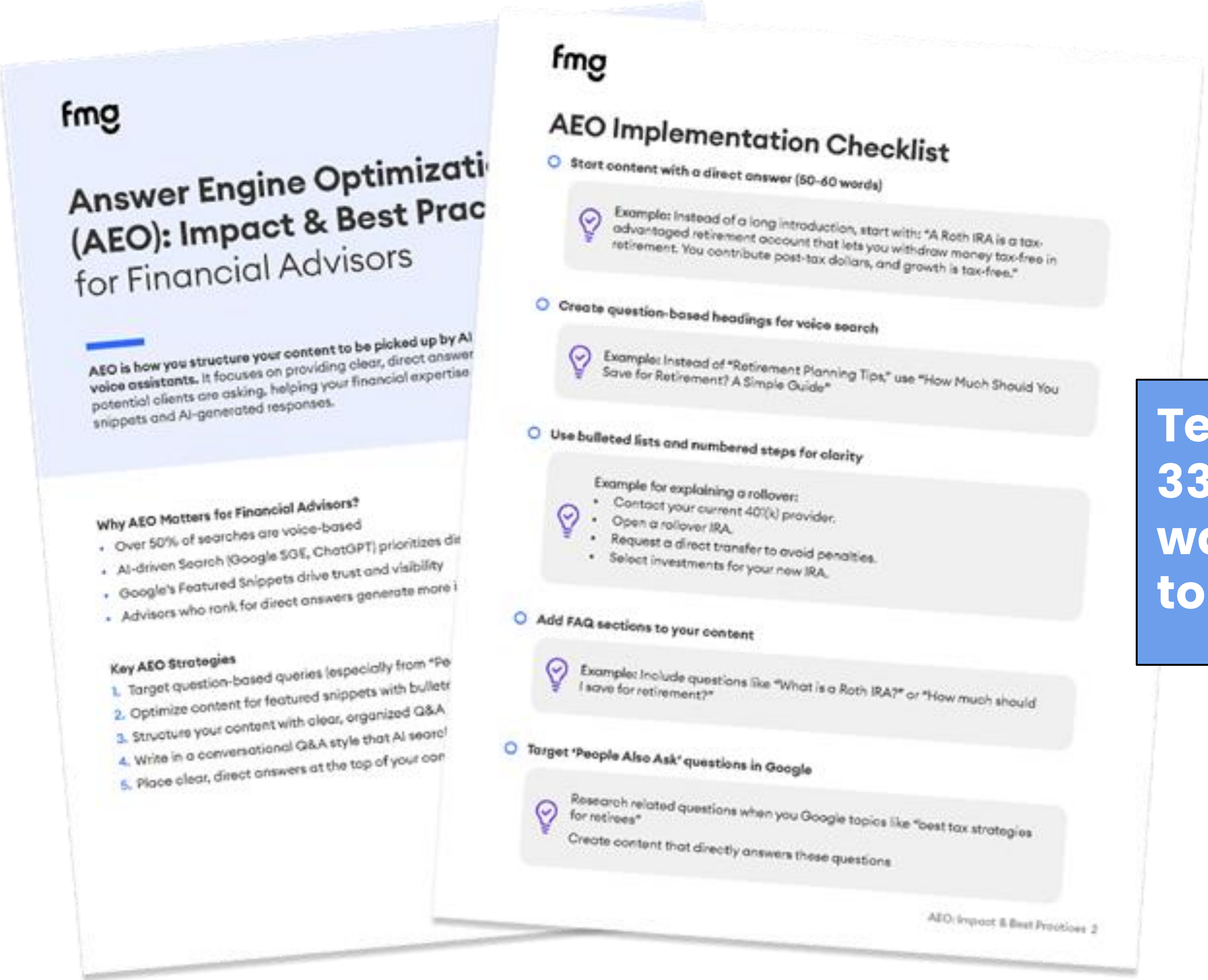
# SEO vs AEO

(Search Engine Optimization) (Answer Engine Optimization)

| SEO | | AEO |
|---|---|---|
| Website Visibility | Focus | Providing direct answers |
| To rank higher | Goal | To be the best answer |
| Broad and keyword-focused | Content | Specific and question-focused |
| Aiming for the top spots | Result | Featured snippets and direct answers |
| Keywords and backlinks | Strategy | Understanding user intent and structured data |



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Answer Engine Optimizati
(AEO): Impact & Best Prac
for Financial Advisors

**AEO is how you structure your content to be picked up by AI voice assistants.** It focuses on providing clear, direct answer potential clients are asking, helping your financial expertise snippets and AI-generated responses.

**Why AEO Matters for Financial Advisors?**
- Over 50% of searches are voice-based
- AI-driven Search (Google SGE, ChatGPT) prioritizes di
- Google's Featured Snippets drive trust and visibility
- Advisors who rank for direct answers generate more i

**Key AEO Strategies**
1. Target question-based queries (especially from "Pe
2. Optimize content for featured snippets with bullete
3. Structure your content with clear, organized Q&A
4. Write in a conversational Q&A style that AI searc
5. Place clear, direct answers at the top of your con

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AEO Implementation Checklist

- Start content with a direct answer (50-60 words)

  Example: Instead of a long introduction, start with: "A Roth IRA is a tax-advantaged retirement account that lets you withdraw money tax-free in retirement. You contribute post-tax dollars, and growth is tax-free."

- Create question-based headings for voice search

  Example: Instead of "Retirement Planning Tips," use "How Much Should You Save for Retirement? A Simple Guide"

- Use bulleted lists and numbered steps for clarity

  Example for explaining a rollover:
  - Contact your current 401(k) provider.
  - Open a rollover IRA.
  - Request a direct transfer to avoid penalties.
  - Select investments for your new IRA.

- Add FAQ sections to your content

  Example: Include questions like "What is a Roth IRA?" or "How much should I save for retirement?"

- Target 'People Also Ask' questions in Google

  Research related questions when you Google topics like "best tax strategies for retirees"

  Create content that directly answers these questions

AEO: Impact & Best Practices 2

**Text AEO to 33777 if you want this sent to you!**

# 02

## They harness the power of social media and social search

# People in UK **spend 2.5 hours per day** on social media/watching videos

Sources:
1. Exploding Topics, 2025 Report on Smartphone Usage
2. Freedom.com
3. Statista.com

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# A New Era:
# Social Search


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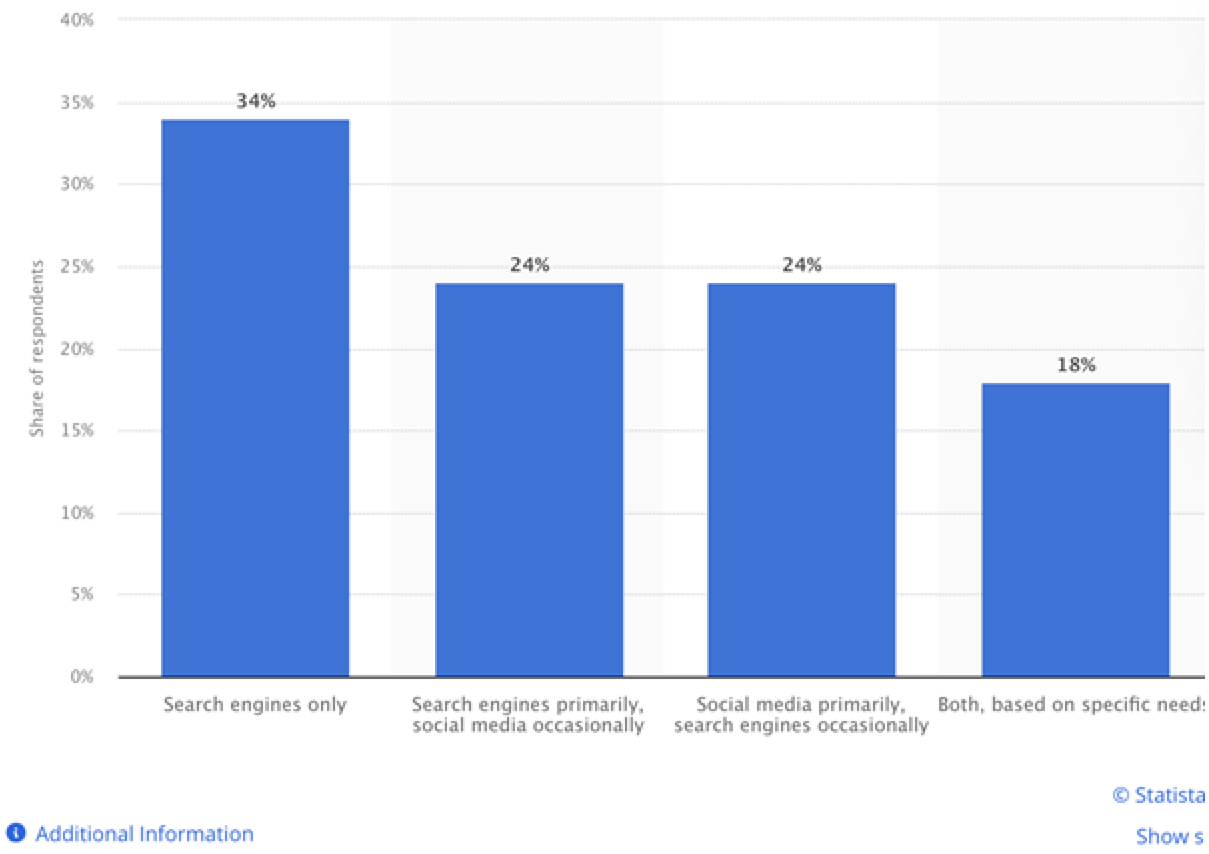
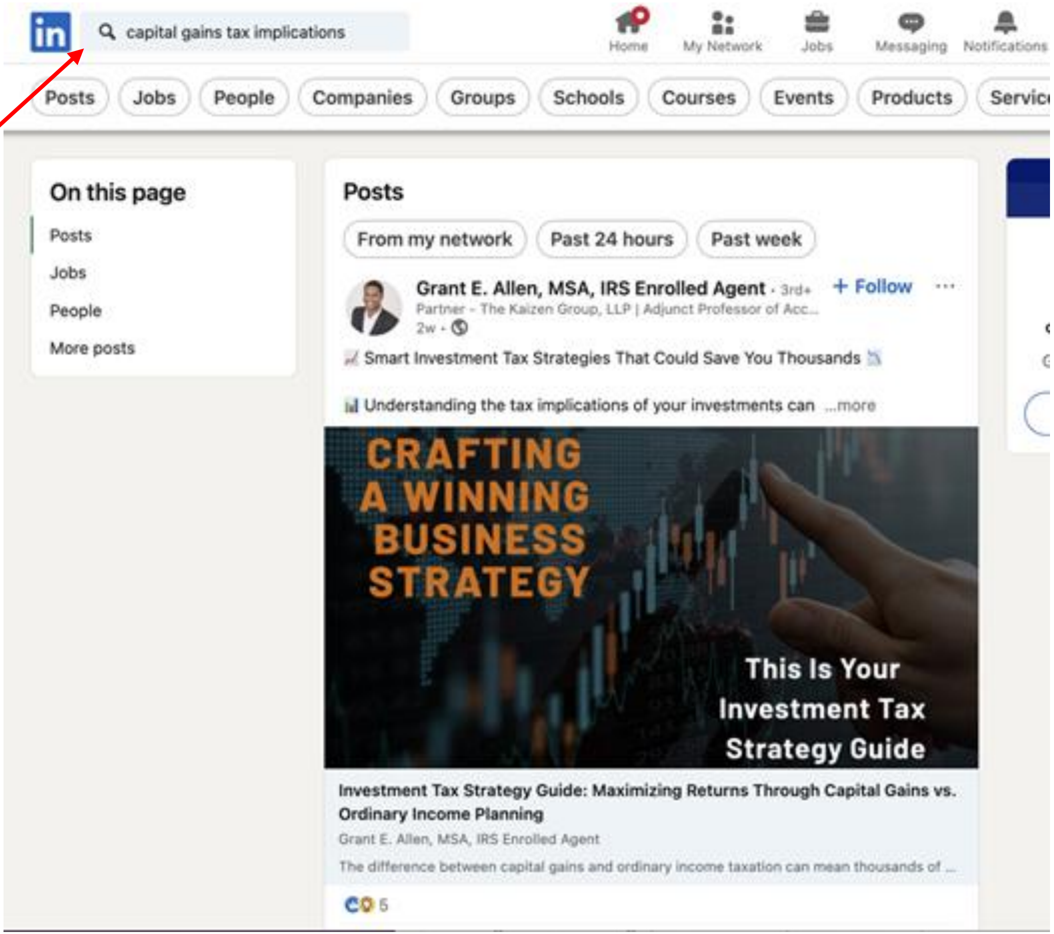
# Search Engine & Social Search Preferences

Source: Statista, April 2024



# Social Search:
# not just for young people on Instagram anymore

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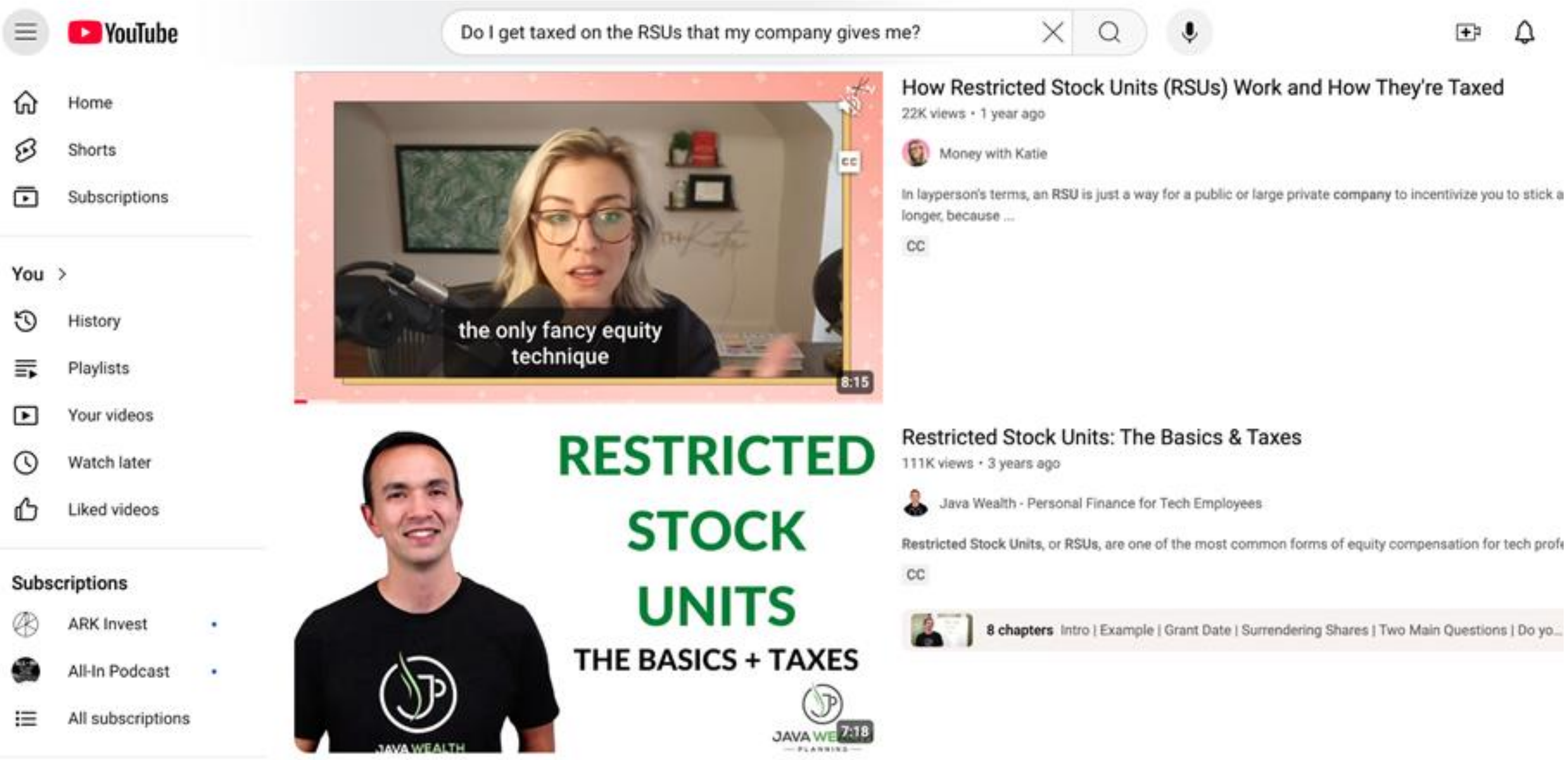
YouTube
Do I get taxed on the RSUs that my company gives me?
Home
Shorts
Subscriptions
You >
History
Playlists
Your videos
Watch later
Liked videos
Subscriptions
ARK Invest
All-In Podcast
All subscriptions
the only fancy equity technique
8:15
How Restricted Stock Units (RSUs) Work and How They're Taxed
22K views • 1 year ago
Money with Katie
In layperson's terms, an RSU is just a way for a public or large private company to incentivize you to stick a longer, because ...
CC
RESTRICTED STOCK UNITS
THE BASICS + TAXES
7:18
Restricted Stock Units: The Basics & Taxes
111K views • 3 years ago
Java Wealth - Personal Finance for Tech Employees
Restricted Stock Units, or RSUs, are one of the most common forms of equity compensation for tech profe
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8 chapters Intro | Example | Grant Date | Surrendering Shares | Two Main Questions | Do yo...

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# Know which social platform & strategies work best for your target audience

**Linkedin:** 18 - 60+ who are still actively working

**Instagram:** 25 - 55 year olds, especially women and mass affluent

**Facebook:** 35 - 75 year olds, especially great for targeting your local community

**Youtube:** Everyone who has a pulse

**TikTok**: Next Gen, though that's changing quickly


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# 03

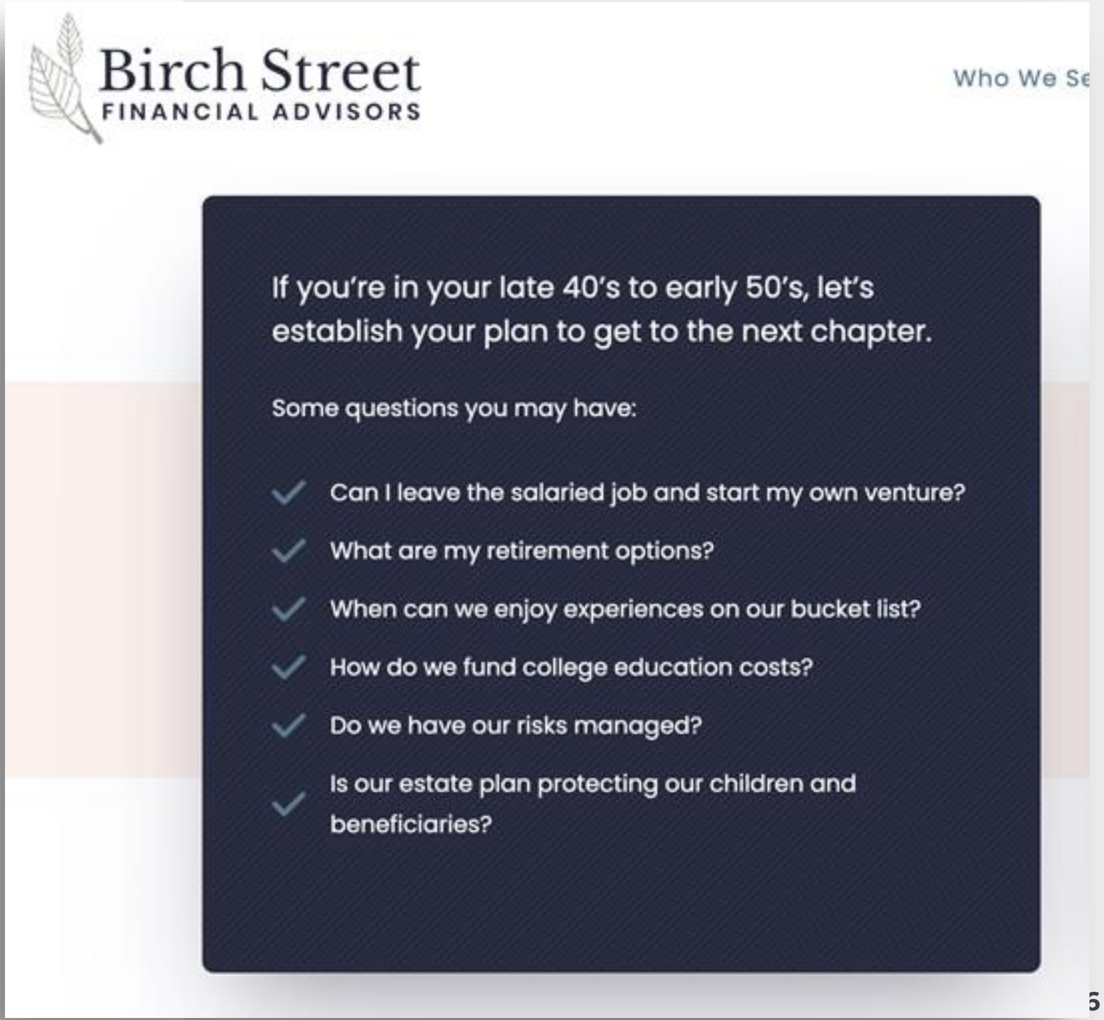
## They stop talking like an advisor, and start talking like their clients

# Exercise: We vs. You

# Write how your clients talk

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

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

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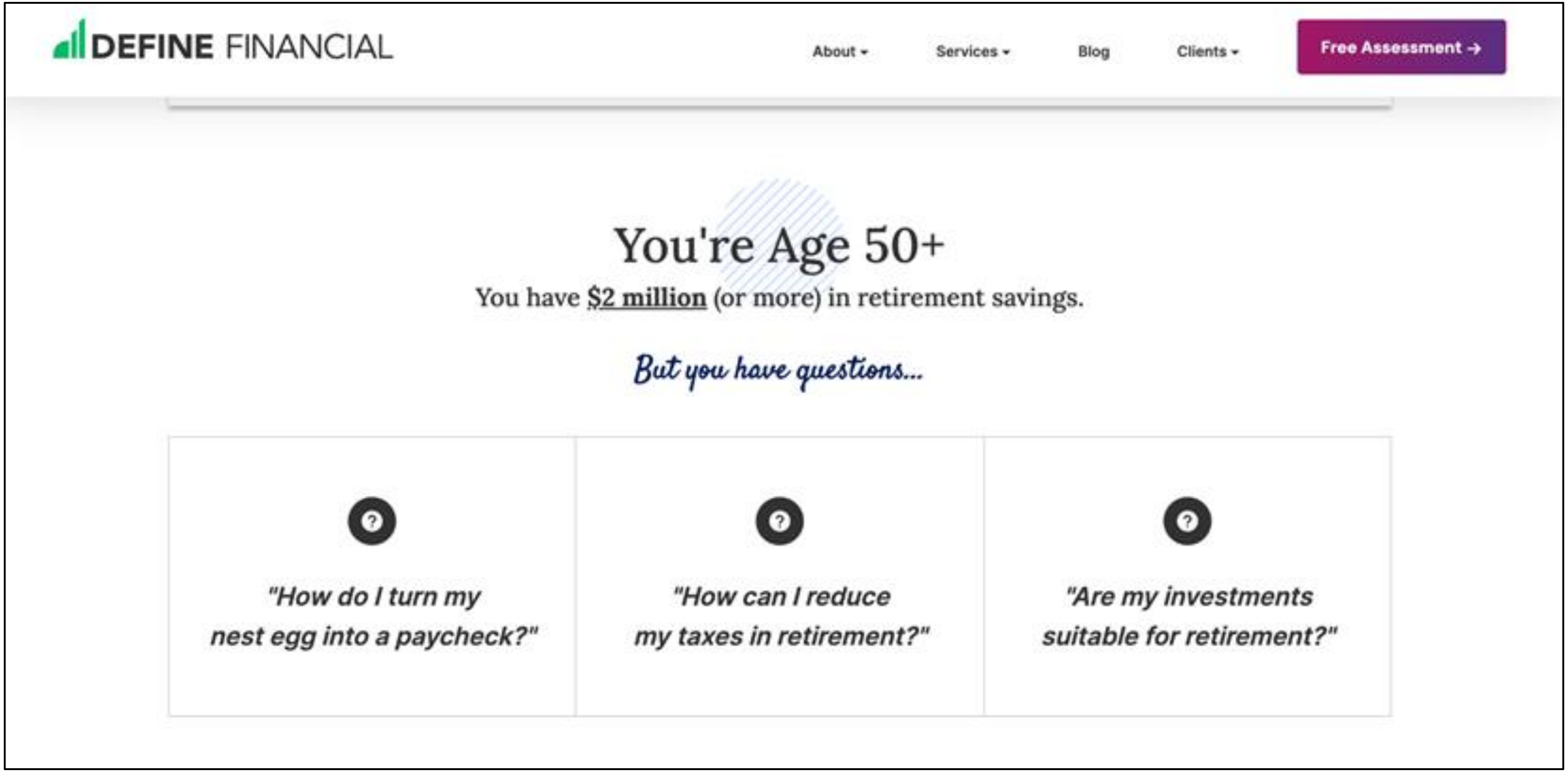
# Questions help visualize that you “get them”



Write so a 7th grader can understand

# Flesch–Kincaid Readability Tests

| 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. |

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# Use an AI tool like Hemingwayapp.com

# 04

## They know how to “hook” people in

# How do you get someone to pay attention?


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# Email Subject Lines, First Lines of Social Posts



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# Email Subject Lines, First Lines of Social Posts

## Intriguing Questions

* *"What if I told you that."*
* *"Have you ever noticed...?"*
* *"Want to know the one thing that changes everything?"*
* *"Why does no one talk about...?"*
* *"Are you making this mistake?"*

## Curiosity Phrases

* *"Here's what nobody tells you about..."*
* *"You won't believe what happened when.."*
* *"This might shock you..."*
* *"Ever wondered why...?"*
* *"Most people don't know this..."*

## Problem-Solving Phrases

* *"Here's how to fix..."*
* *"Struggling with this? Try this..."*
* *"The simple way to overcome...*
* *"This will change the way you think about..."*
* *"Finally, a solution for..."*

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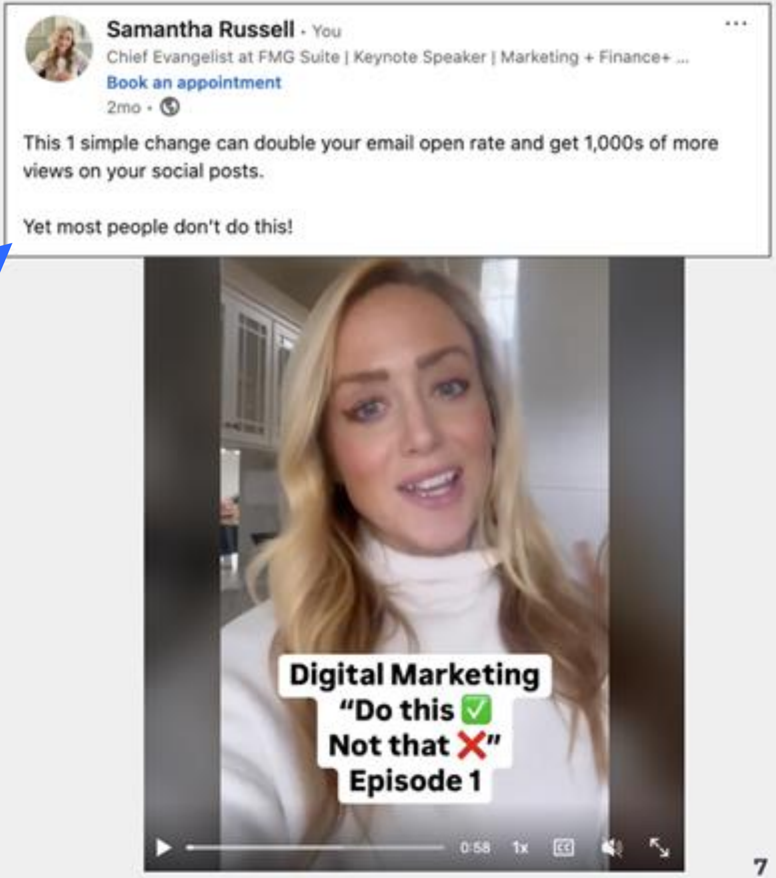
# Why Should Someone Care?

Use the “what’s in it for me mindset” when crafting your content

Before posting or emailing - ask yourself: **WHY should someone care?**

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# Social Post Example:

If you are a HNW 30 - 50 year old, this will grab your attention.

**We all want to avoid costly mistakes**


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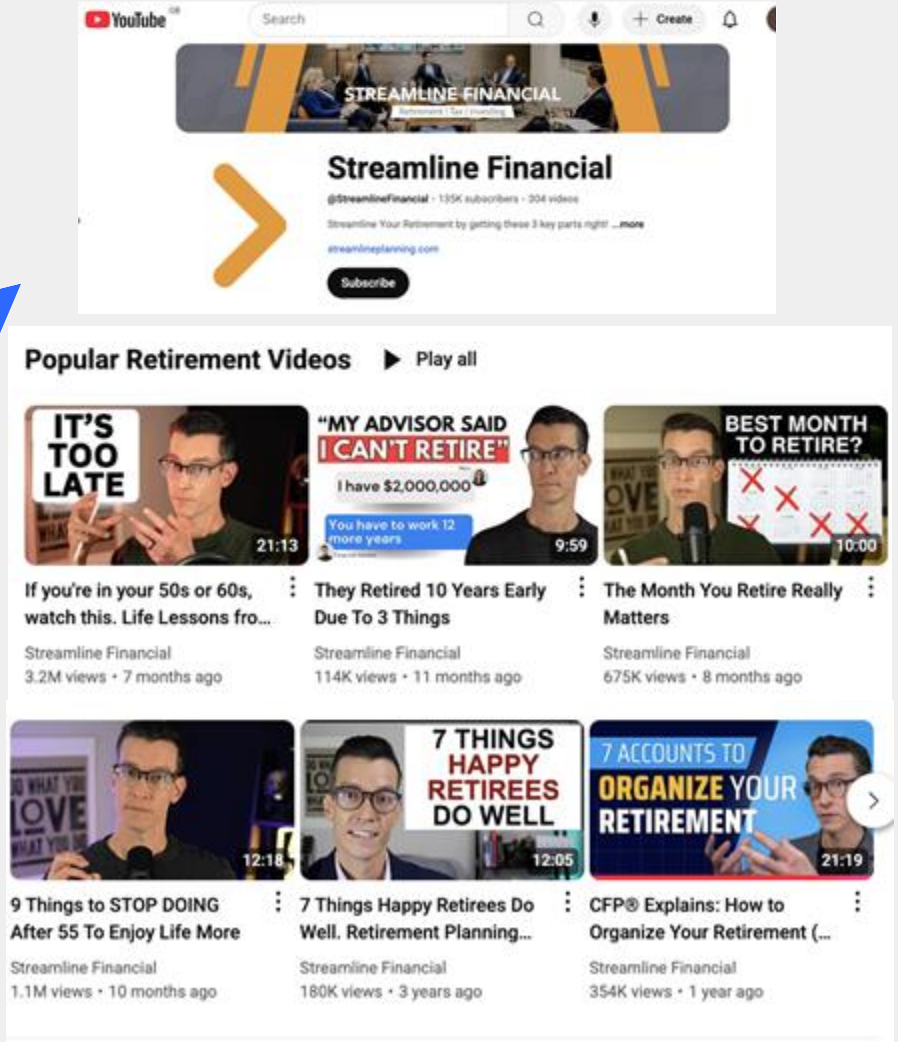
# Youtube Example:

Giving Retirement Planning Advice that is NOT just Financial

**Practical, Helpful Tips No Matter Your Financial Situation**

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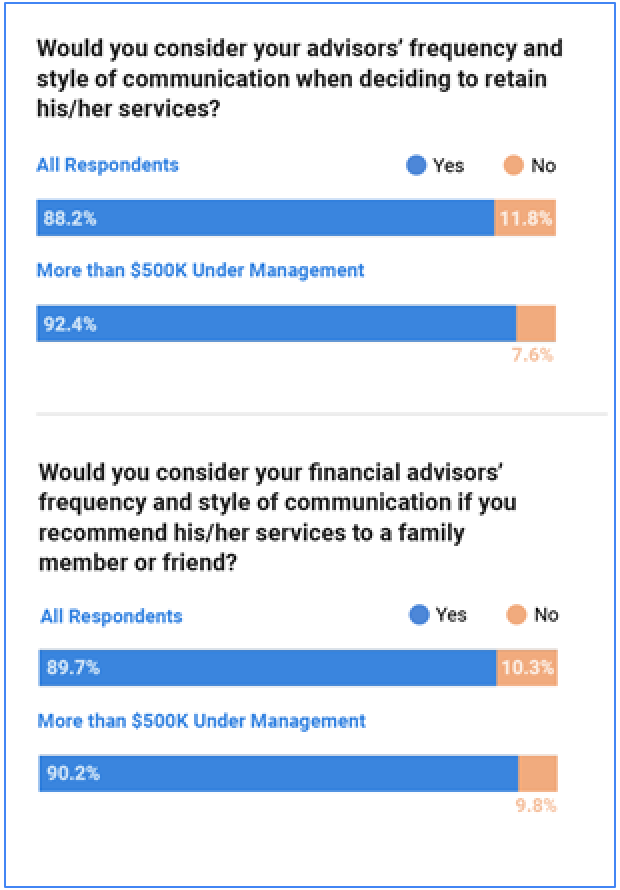
# 05

## They harness the power of strategic “nudges”

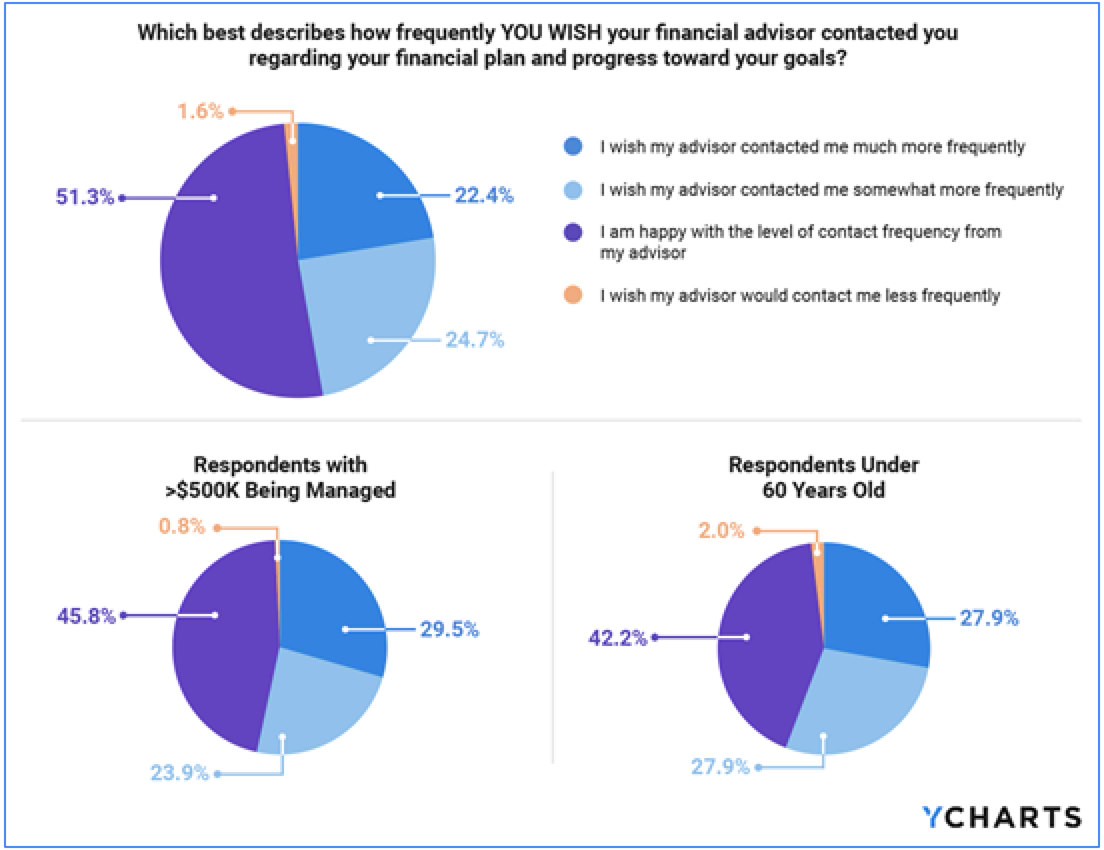
**9 out of 10** clients consider their advisors' communication frequency and style when deciding whether to retain their services + make referrals

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




Source: 2024 Ycharts Survey

# Communication is KEY to Organic Growth

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## 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% |
| Webinars | 8% |
| Book | 7% |
| Solicitors | 7% |
| Podcasts | 7% |
| Radio | 5% |
| Custodial Referrals | 5% |
| Marketing Lists | 3% |



Source: Kitces Research Report, 2022 https://www.kitces.com/blog/advisor-marketing-strategy-client-acquisition-cost-efficient-marketing-time-dollar-cost/

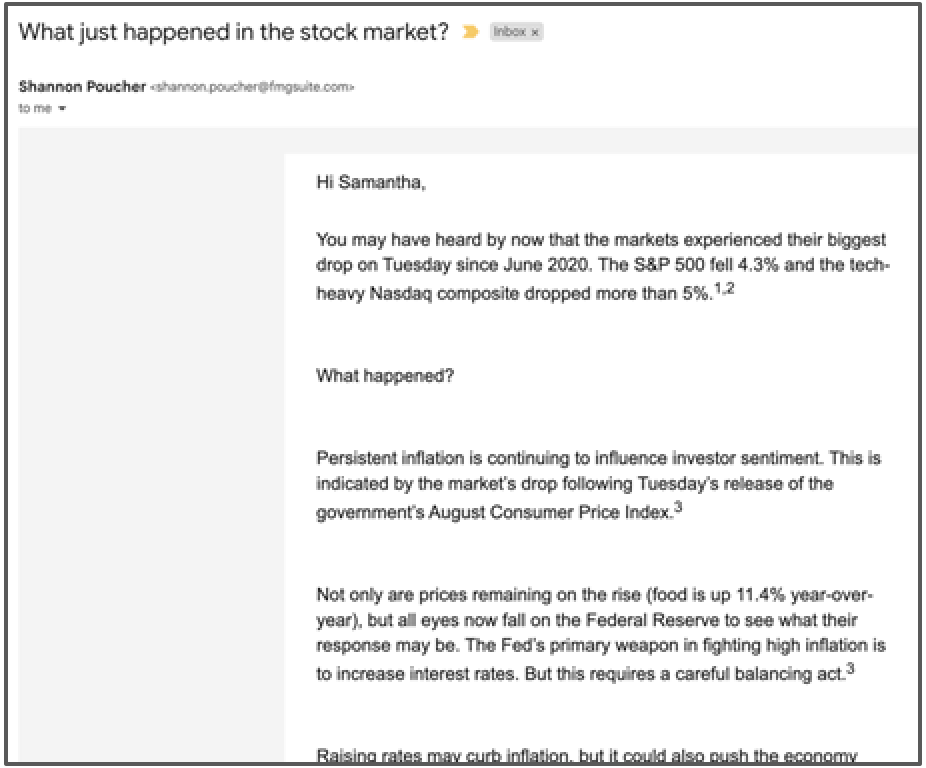
# Drip Email Marketing

**Once you have a prospect's email:**

- Send weekly or bi-weekly emails to stay top of mind

**REMEMBER:**

- 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



What just happened in the stock market? Inbox ×

Shannon Poucher <shannon.poucher@fmgsuite.com>
to me

Hi Samantha,

You may have heard by now that the markets experienced their biggest drop on Tuesday since June 2020. The S&P 500 fell 4.3% and the tech-heavy Nasdaq composite dropped more than 5%.[1,2]

What happened?

Persistent inflation is continuing to influence investor sentiment. This is indicated by the market's drop following Tuesday's release of the government's August Consumer Price Index.[3]

Not only are prices remaining on the rise (food is up 11.4% year-over-year), but all eyes now fall on the Federal Reserve to see what their response may be. The Fed's primary weapon in fighting high inflation is to increase interest rates. But this requires a careful balancing act.[3]

Raising rates may curb inflation, but it could also push the economy

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# 06

# They Use the Mere Exposure Effect To Their Benefit



# Who Do you Know?



Marketing Masterclass

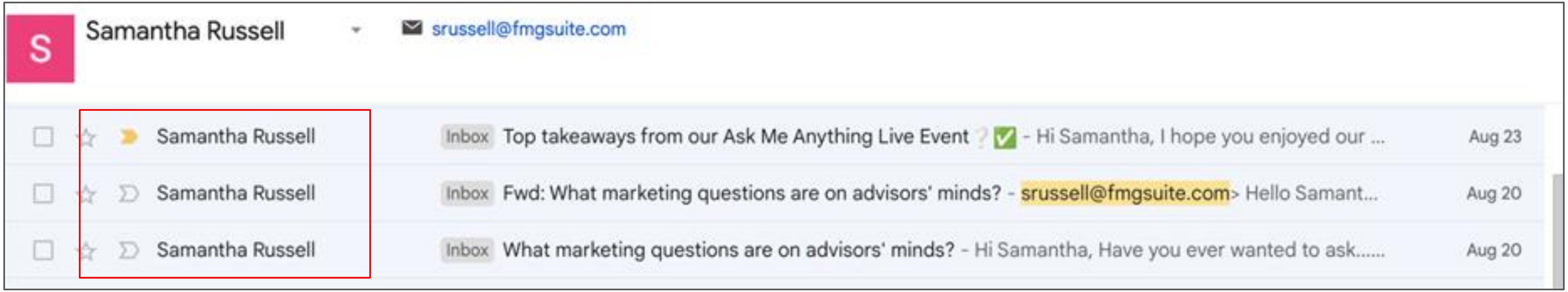
## "Face of the Company"

- Steve Jobs, Apple
- Rory Sutherland, Oglivy
- Sara Blakely, Spanx
- Sir Richard Branson, Virgin Grp

## Never Seen

- Jon R. Moeller, Procter & Gamble
- Elliott Hill, Nike

# Use the Mere Exposure Effect To Your Benefit



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# The easiest way to tap into the Mere Exposure Effect… Video + Social Media

# Use the REAR camera, NOT the selfie camera. Oh, and buy a tripod!

# Use The Built-in Grid to Frame Shot

(Settings> Camera> Toggle “Grid” to ON)

**Your eyes should align with the top line!**

# Forget fancy equipment.
# Use NATURAL light.

**Sit in Front of a window**

**Look TOWARDS the light**

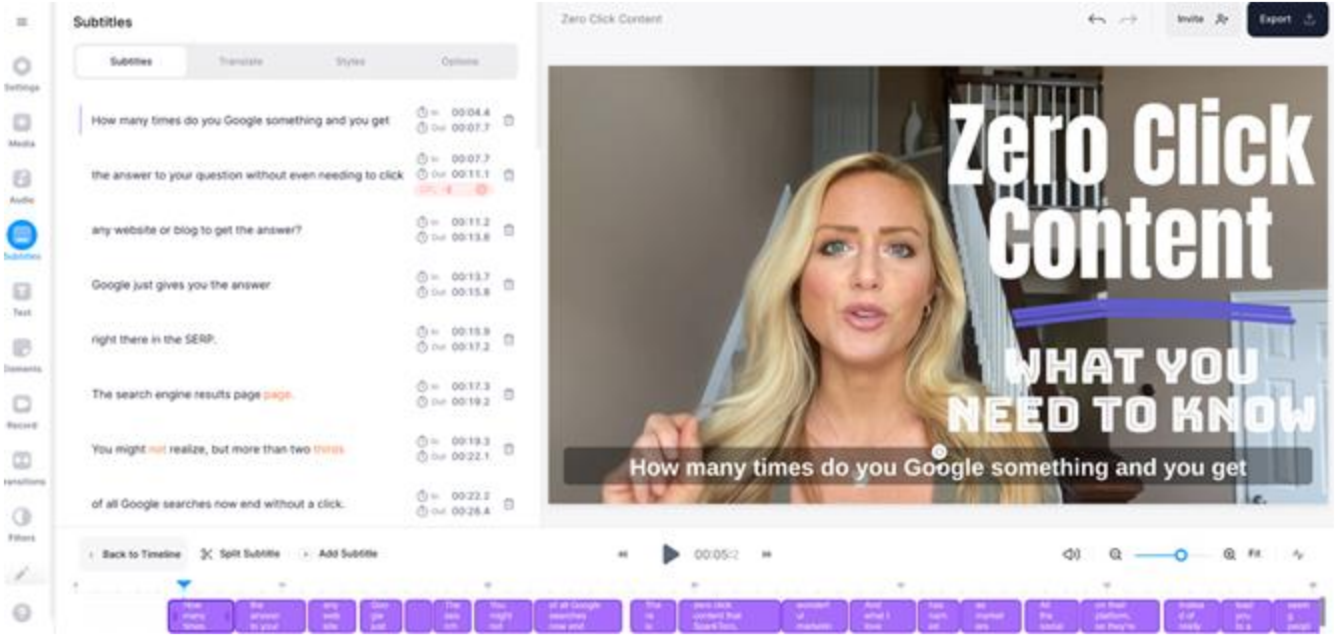
# Do NOT text or email the video from phone to computer.

**Airdrop it !**

**OR, upload to a tool like Dropbox or Google Transfer**

# Once on your Desktop, Edit using Veed.io

- **Add subtitles**
- **Put Text over video**
- **Cut sections**
- **Splice together**
- **Bring in images**
- **and more!**



# Proven tactics to generate new business from LinkedIn

# Playbook for LinkedIn Content

**Minimum 3 posts per week:**

- 1 that shows off your expertise
- 1 that starts conversation/gets 👀
- 1 that shares personal photo/angle

- ask a question that is EASY for people to answer whenever you can

The mix is important! 👆

## If you don't engage with others,

## it won't matter how good your content is

# Playbook for LinkedIn Engagement

- 5 comments to 1st degree connections
- 5 comments to 2nd/3rd degree connections
- Respond to all comments on own content
- 5 DMs
- 3 connection requests
- 3 follows

That takes about 15-20 minutes 👆

**←This is the part you CANNOT outsource.**

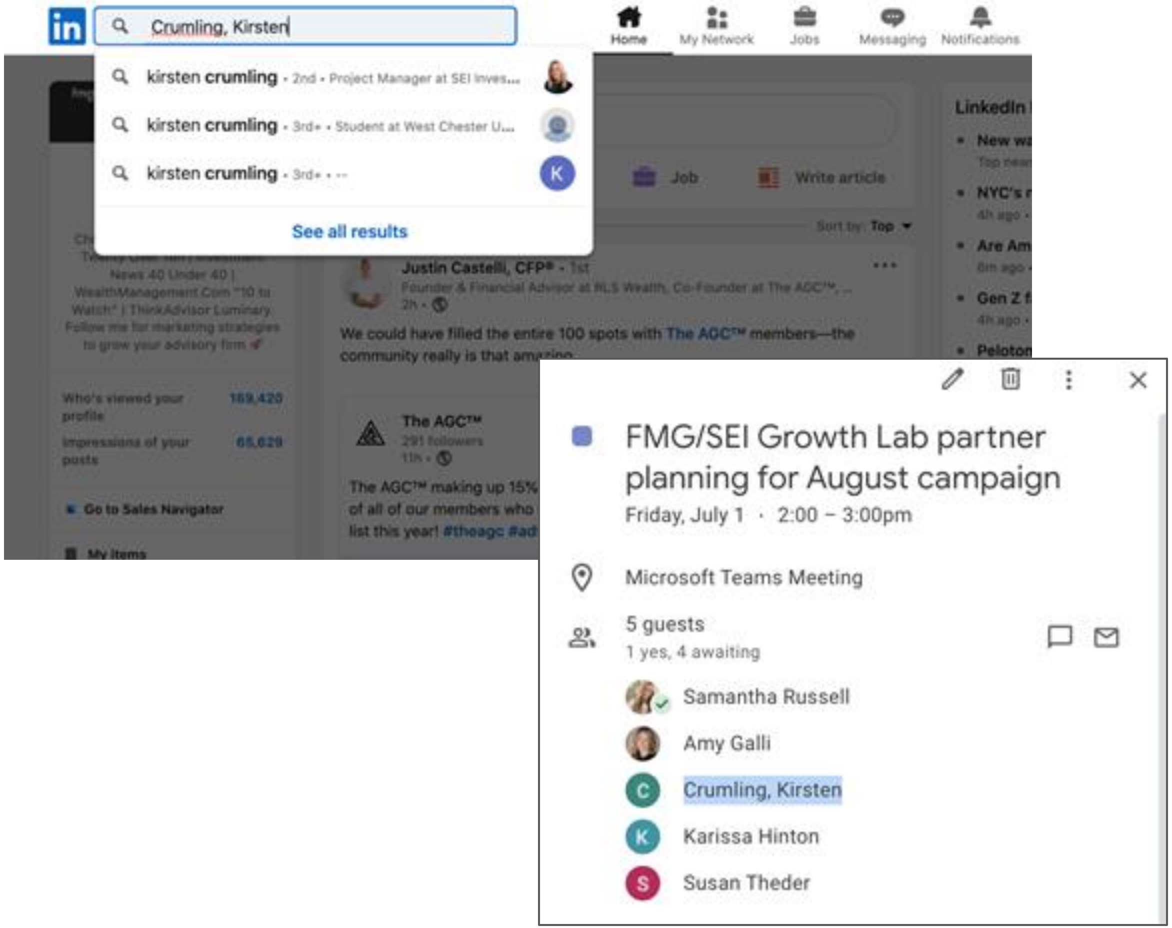
**YOU or YOUR TEAM has to do this.**

# A simple way to get 1,000s of new connections this year

**Step 1**
Every Friday, Go through the last 5 days of your calendar and emails

**Step 2**
Copy the person's name or email, look them up via Linkedin

**Step 3**
Invite them to connect on LinkedIn- that's it!

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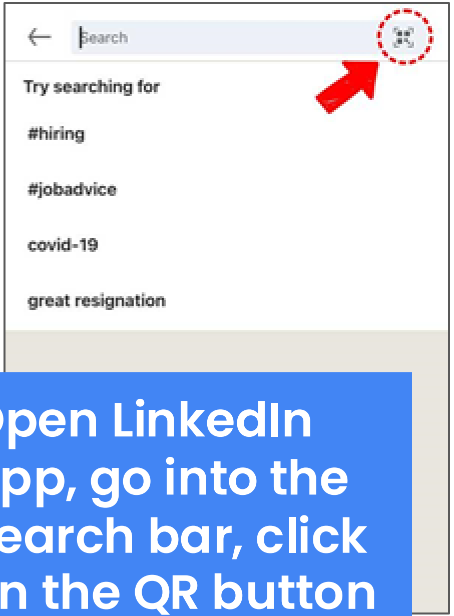
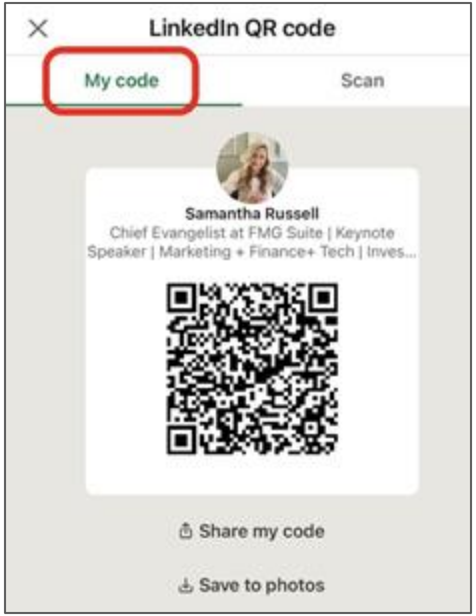
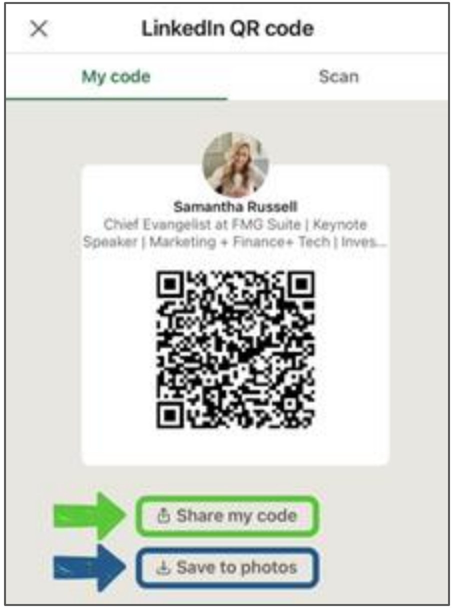
# Ditch the business cards... use your Linkedin QR code!




**Open LinkedIn app, go into the search bar, click on the QR button on the top right**

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Remember, if you have no network, no one will see your content! It’s time to grow

# People Connect With People

Show your personality. Build your brand. Find your fans.

Samantha Russell
Chief Evangelist, FMG
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