

Marketing Secrets of Hyper Growth Advisory Firms

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

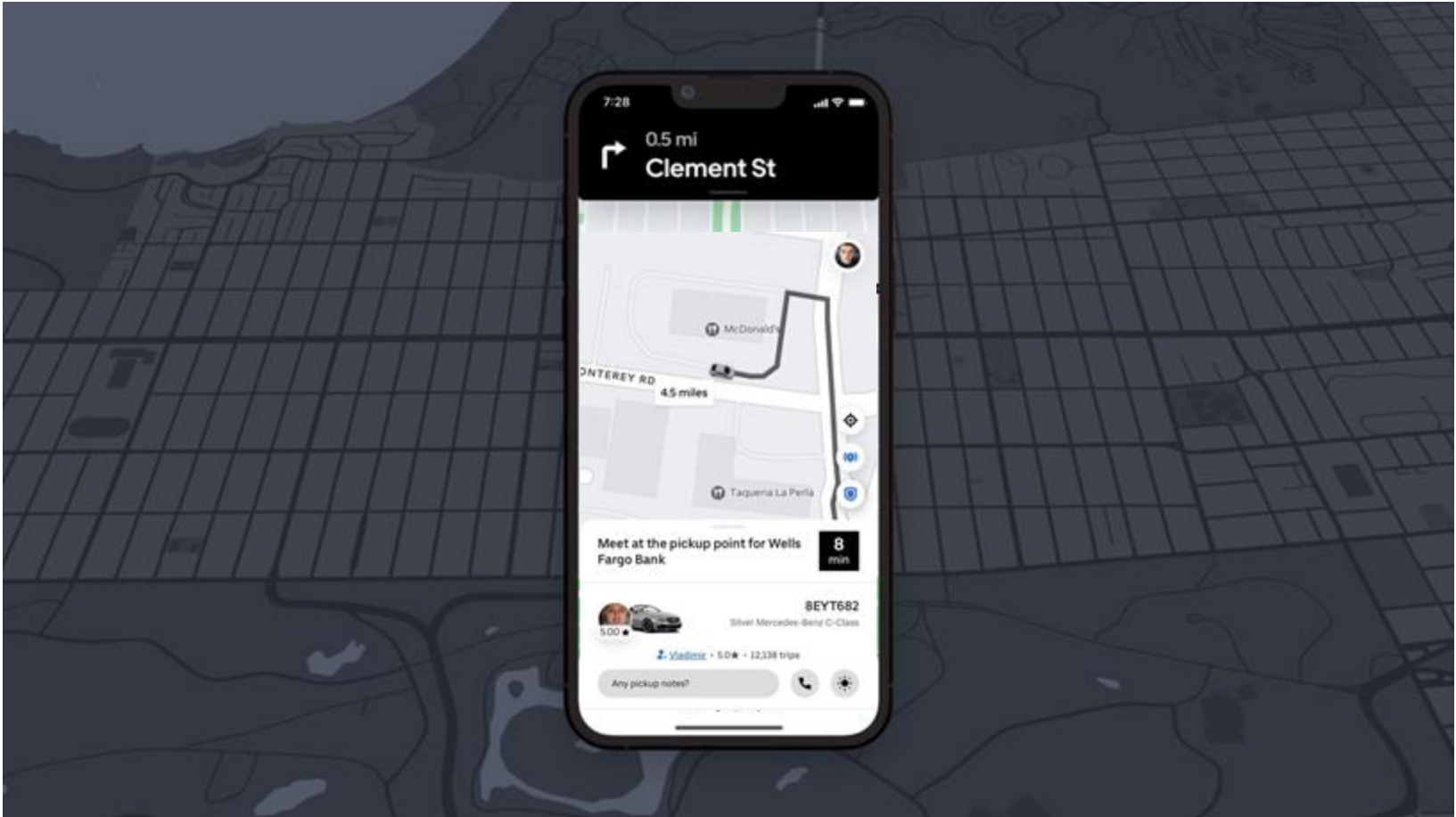
Presented by:

Samantha Russell

Chief Evangelist

FMG

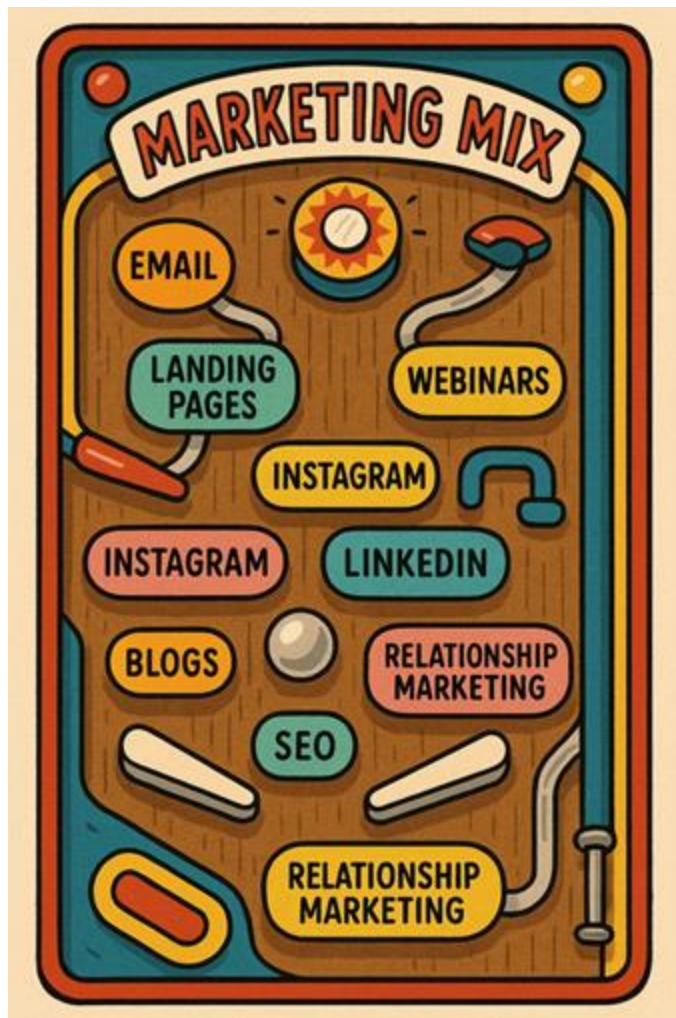




“The Uber map is a psychological moonshot, because **it does not reduce the waiting time for a taxi but simply makes waiting 90% less frustrating**” – Rory Sutherland

01

They understand how consumers find an advisor today has drastically changed



How searches used to work...



how to start claiming social security



Consumer Financial Protection Bureau (.gov)

<https://www.consumerfinance.gov/before-you-claim>

Planning your Social Security claiming age

Planning your Social Security claiming age · Step 1: Explore how the age you start collecting Social Security affects your retirement benefits · Step 2: Learn ...



Social Security Administration (.gov)

<https://www.ssa.gov/pubs> PDF

Your Retirement Checklist

Base your decision about when to apply for benefits on your individual and family circumstances. We hope the following information will help you understand how ...
4 pages



AARP

<https://www.aarp.org/claim-benefits-early-or-late>

3 Reasons You May Want to Claim Social Security Early

Oct 19, 2023 — Use AARP's Social Security Calculator to find out when to apply and how much you'll get. Still, deciding when to start Social Security doesn't ...



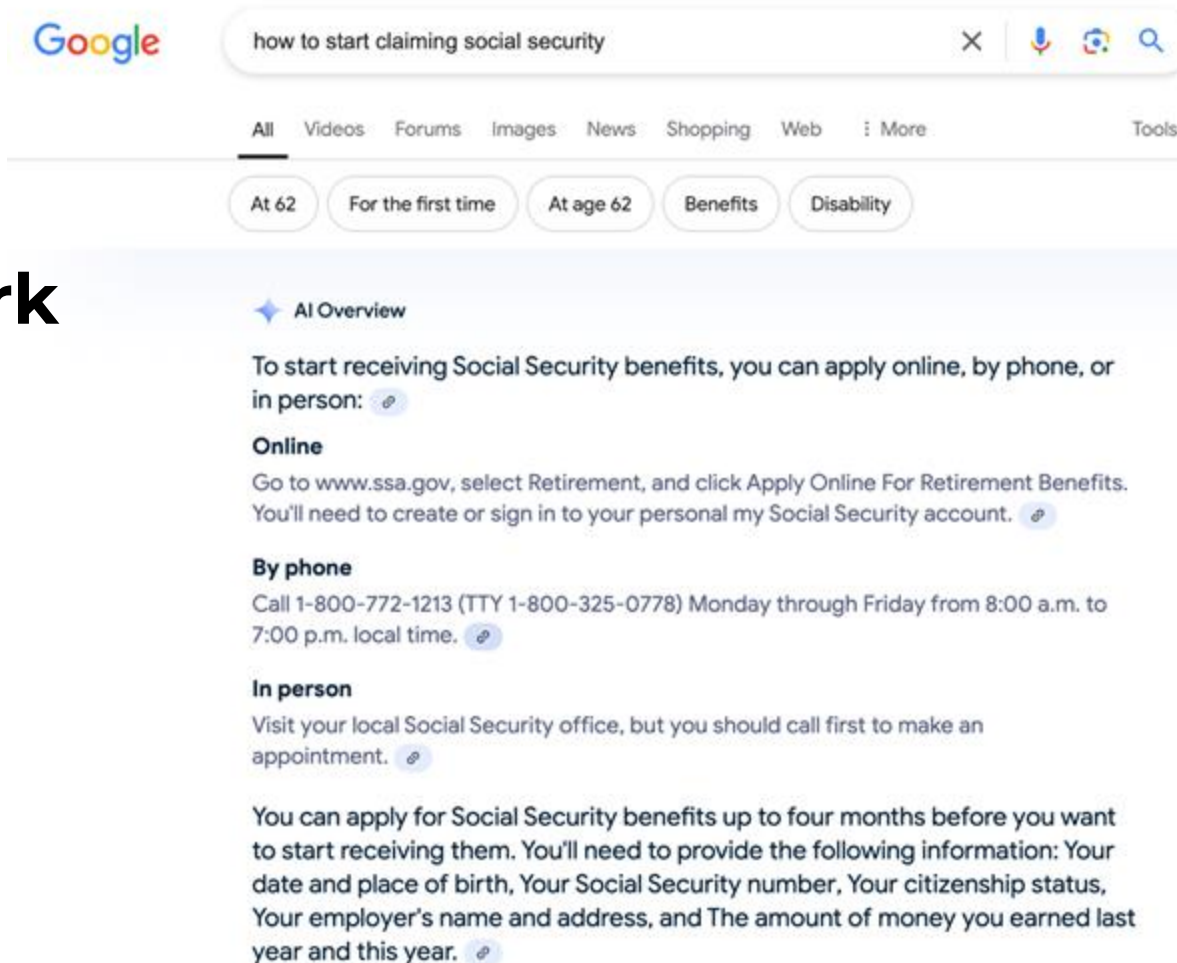
Merrill Lynch

<https://www.ml.com/articles/social-security-aiming-for>

Determining The Best Age to Collect Social Security (for You)

One of the first big decisions we're faced with as we approach retirement is when to claim our benefits — and timing is important. While you can start as early ...

How they work today...



Google

how to start claiming social security

All Videos Forums Images News Shopping Web More Tools

At 62 For the first time At age 62 Benefits Disability

AI Overview

To start receiving Social Security benefits, you can apply online, by phone, or in person: ⓘ

Online

Go to www.ssa.gov, select Retirement, and click Apply Online For Retirement Benefits. You'll need to create or sign in to your personal my Social Security account. ⓘ

By phone

Call 1-800-772-1213 (TTY 1-800-325-0778) Monday through Friday from 8:00 a.m. to 7:00 p.m. local time. ⓘ

In person

Visit your local Social Security office, but you should call first to make an appointment. ⓘ

You can apply for Social Security benefits up to four months before you want to start receiving them. You'll need to provide the following information: Your date and place of birth, Your Social Security number, Your citizenship status, Your employer's name and address, and The amount of money you earned last year and this year. ⓘ

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.

✓ 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.

📄 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?

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



best financial advisor near me



ameripriseadvisors.com

<https://www.ameripriseadvisors.com>

Ameriprise Financial: Find a financial advisor near me

Use the search function above to find a financial advisor near you. Enter your location. Use your ZIP or City, State. Some advisors may also be available for ...



Barron's

<https://www.barrons.com> › advisor › report › top-finan...

2024 Top 1200 U. S. Financial Advisors Ranked by State

Here are America's best financial advisors, organized by state. The rankings are based on data provided by around 6,000 of the nation's most productive advisors ...



Northwestern Mutual

<https://www.northwesternmutual.com> › find-a-financial...

Find A Financial Advisor or Representative

Looking for someone specific? Search for a financial advisor or professional you're already working with, or find one by name.



NerdWallet

<https://www.nerdwallet.com> › best › investing › financial...

Top Financial Advisors: Best Firms for 2025

Dec 18, 2024 — The best financial advisors include Zoe Financial, Vanguard Personal Advisor, Facet, Harness Wealth, Empower and Schwab Intelligent ...

Businesses :



Carson Wealth

4.9 ★★★★★ (58) · Financial planner

15+ years in business · 1 Bigelow Sq 20th floor

Open · Closes 5 PM · (412) 904-2017

💬 "The level of care and attention to detail they offer is unmatched."



Website



Directions

North River Wealth Advisors

5.0 ★★★★★ (25) · Financial planner

5800 Corporate Dr Suite 300

Open · Closes 5 PM · (412) 783-1781

💬 "Their attention to your personal, financial needs are exemplary."



Website



Directions

YTS Wealth Management

5.0 ★★★★★ (64) · Financial planner

5+ years in business · Export, PA

Open · Closes 4:30 PM · (724) 733-4334

💬 "Her knowledge and attention to each client is second to none."



Website



Directions

How they look Today on Google...

*What do all
of these have in
common?*

How they look today on 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 capital ↓ st 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



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!



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

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



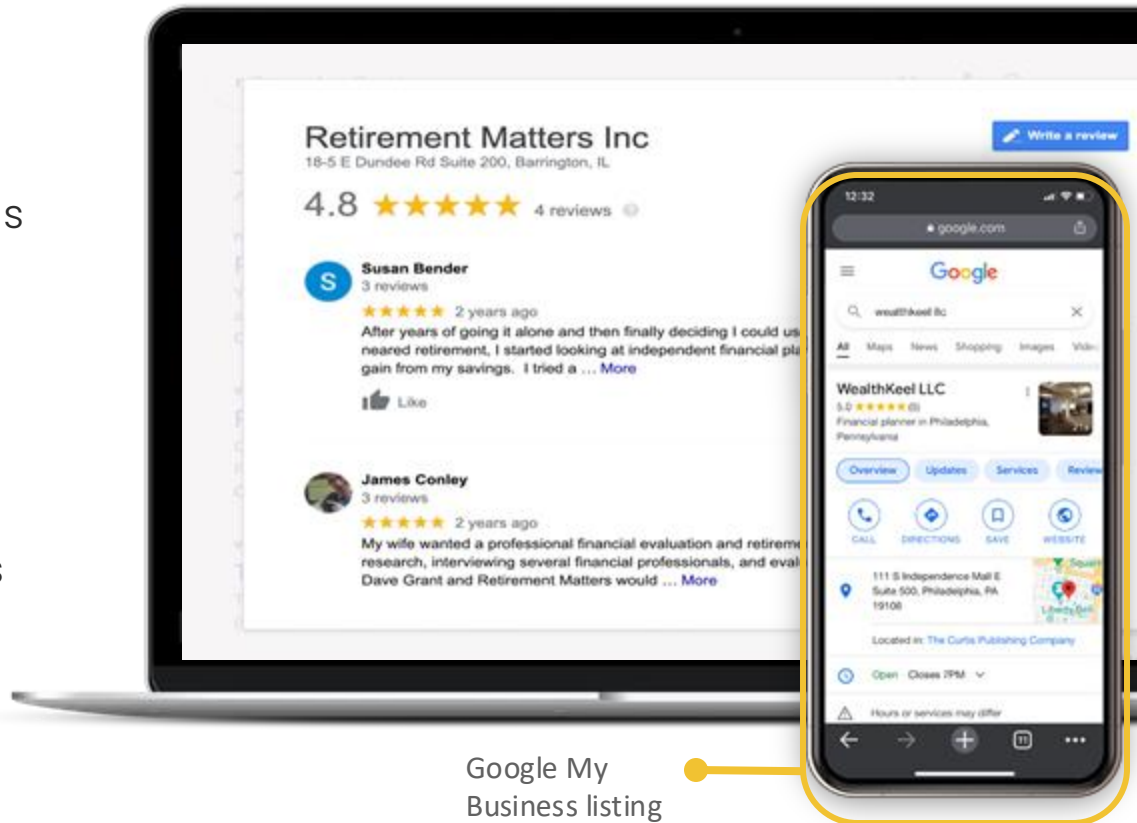
Google Reviews = The New Referrals

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





SEO vs AEO

(Search Engine Optimization)

(Answer Engine Optimization)





Answer Engine Optimization (AEO): Impact & Best Practices for Financial Advisors

AEO is how you structure your content to be picked up by AI voice assistants. It focuses on providing clear, direct answers 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 direct
- Google's Featured Snippets drive trust and visibility
- Advisors who rank for direct answers generate more leads

Key AEO Strategies

1. Target question-based queries (especially from "People Also Ask")
2. Optimize content for featured snippets with bullet points
3. Structure your content with clear, organized Q&A
4. Write in a conversational Q&A style that AI search
5. Place clear, direct answers at the top of your content



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

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:

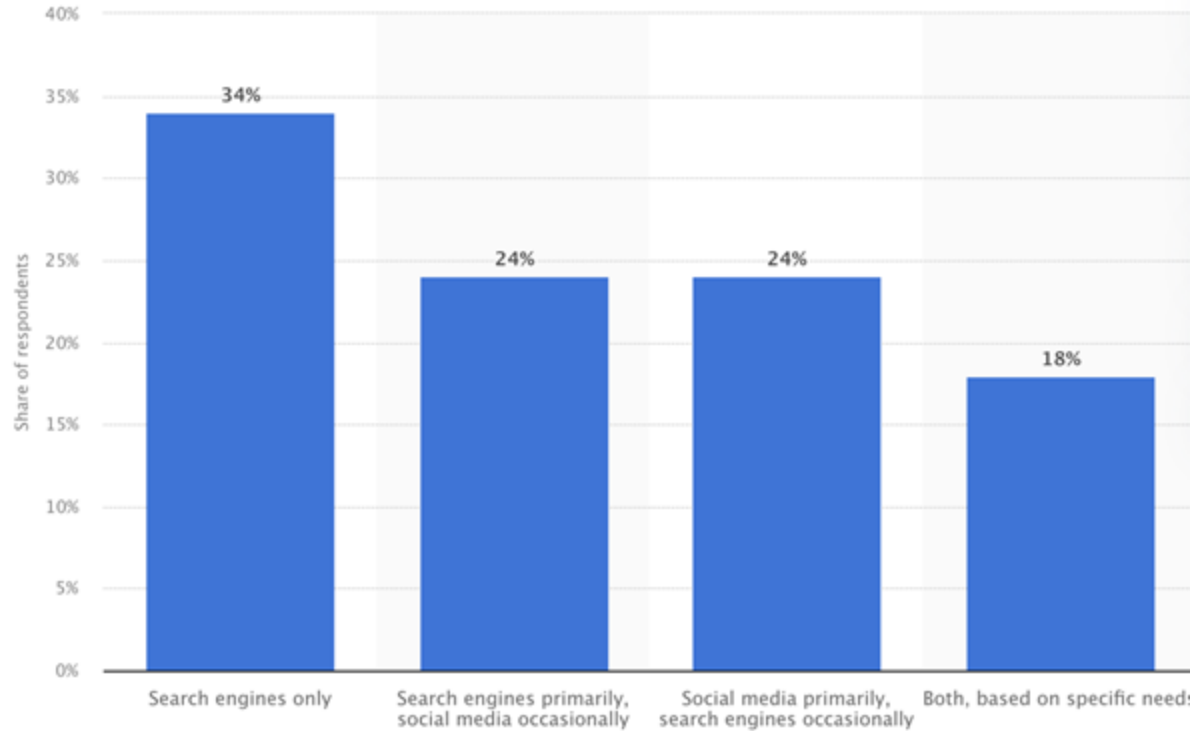
1. Exploding Topics, 2025 Report on Smartphone Usage
2. Freedom.com
3. Statista.com

A New Era: Social Search

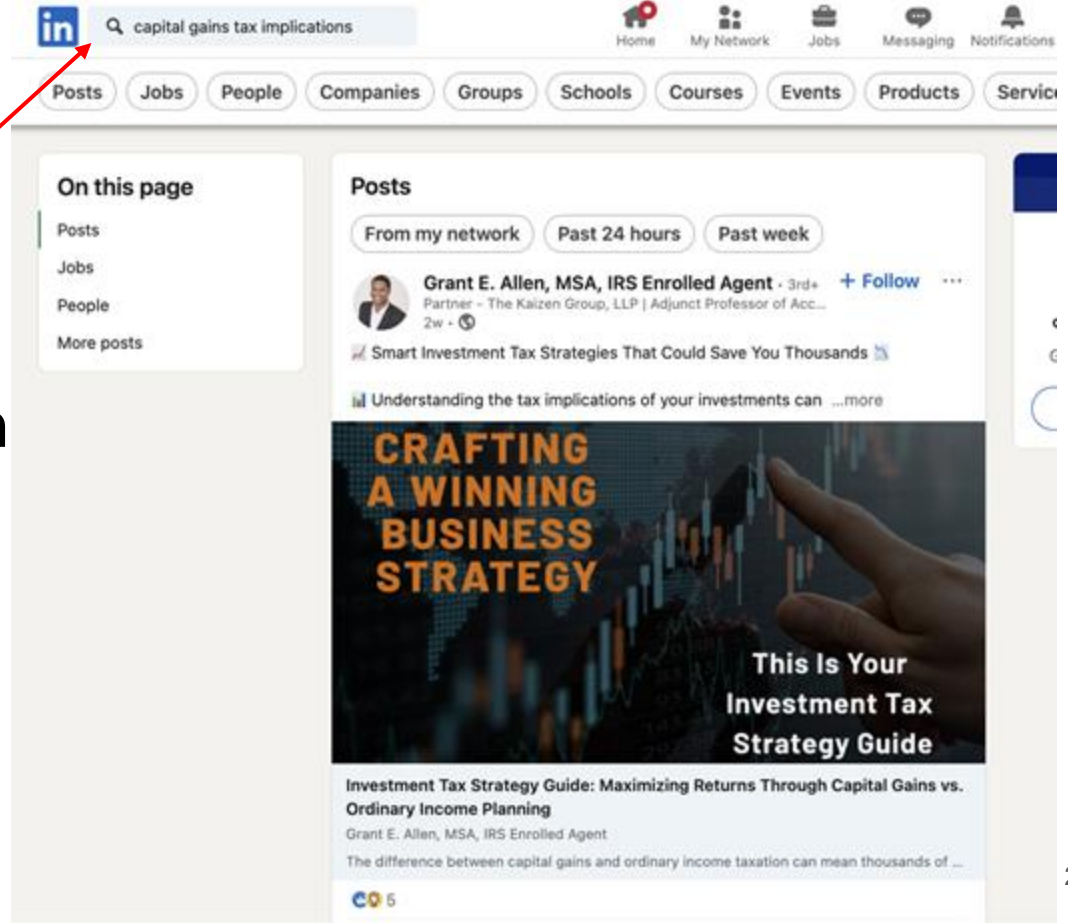


Search Engine & Social Search Preferences

Source: Statista, April 2024



Social Search:
not just for young
people on Instagram
anymore





Home



Shorts



Subscriptions

You >



History



Playlists



Your videos



Watch later



Liked videos

Subscriptions



ARK Invest



All-In Podcast



All subscriptions



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



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 profi

CC



8 chapters Intro | Example | Grant Date | Surrendering Shares | Two Main Questions | Do yo...

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

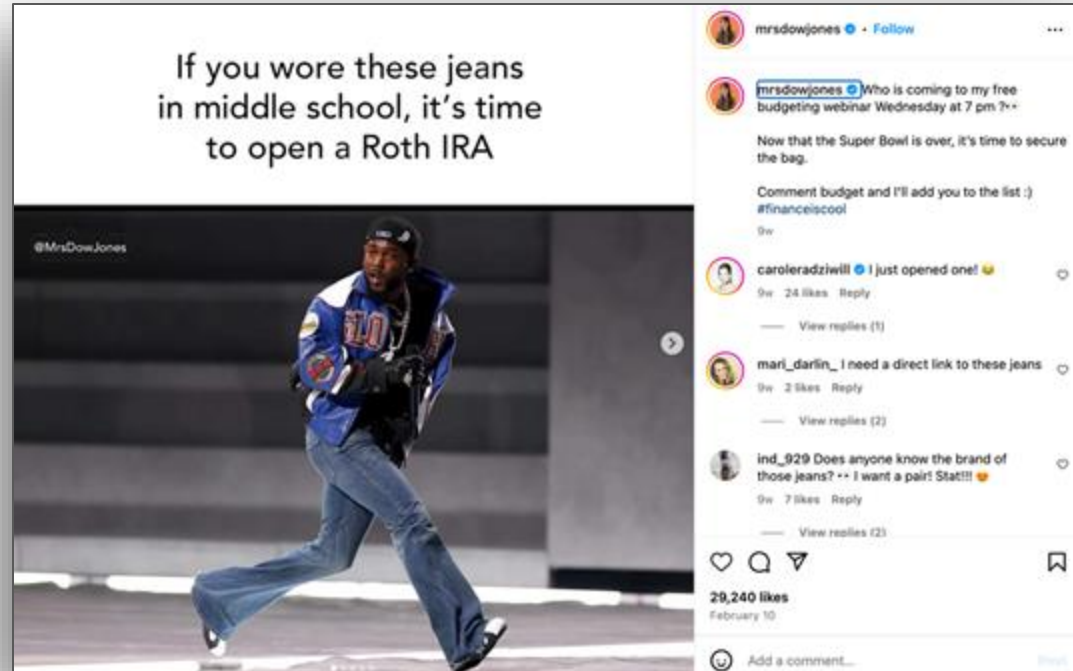
LinkedIn: 18 – 60+ who are still actively working

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



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?



Birch Street
FINANCIAL ADVISORS

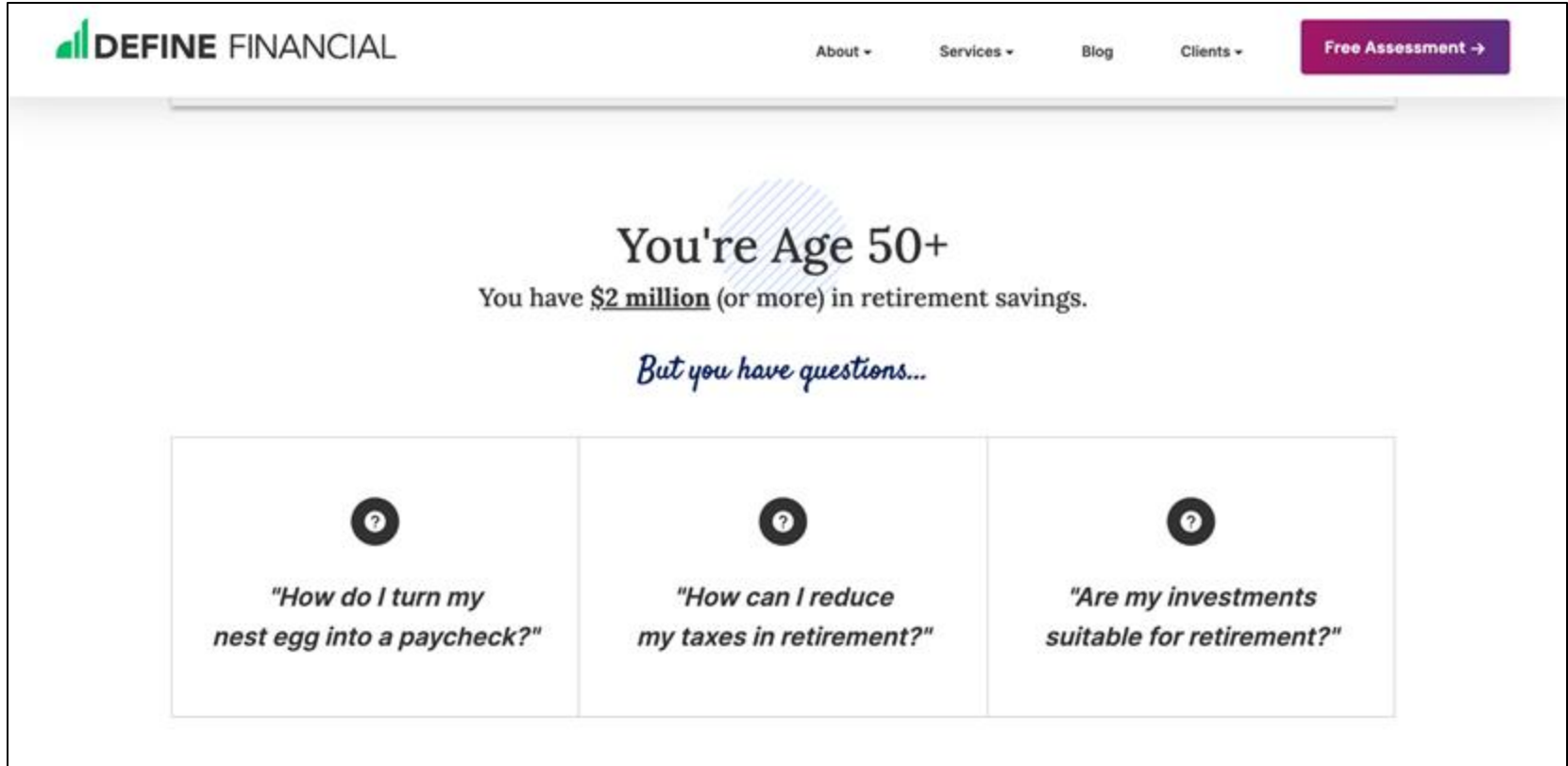
Who We Se

If you're in your late 40's to early 50's, let's establish your plan to get to the next chapter.

Some questions you may have:

- ✓ Can I leave the salaried job and start my own venture?
- ✓ What are my retirement options?
- ✓ When can we enjoy experiences on our bucket list?
- ✓ How do we fund college education costs?
- ✓ Do we have our risks managed?
- ✓ Is our estate plan protecting our children and beneficiaries?

Questions help visualize that you “get them”






DEFINE FINANCIAL

About ▾ Services ▾ Blog Clients ▾ [Free Assessment →](#)

You're Age 50+
You have \$2 million (or more) in retirement savings.

But you have questions...

 <i>"How do I turn my nest egg into a paycheck?"</i>	 <i>"How can I reduce my taxes in retirement?"</i>	 <i>"Are my investments suitable for retirement?"</i>
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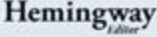
Write so a **7th grader**
can understand



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.


Use an AI tool like Hemingwayapp.com



File **Plus** Fix Grammar **Plus** Rewrite **Plus** Paragraph ▾ B I u¹

How to use Hemingway Menu ▾

AI Tools - Try Free



Hemingway Editor Plus
Fix highlighted issues, check grammar, and adjust tone.
Free 2-week trial.

Hemingway App makes your writing concise and correct.

The app highlights lengthy, complex sentences and common errors; if you see a yellow sentence, shorten or split it. If you see a red highlight, your sentence is so dense and complicated that your readers will get lost trying to follow its meandering, convoluted logic—try editing this sentence to remove the red highlight.


You can utilize a simpler word instead of a purple one. Click on highlights to fix them.

Adverbs, passive voice, and other weakening phrases are marked in blue. I believe you should replace them with more forceful language.

Our Hemingway Editor Plus service uses AI to fix these highlights for you. It also features an advanced grammar checker that marks issues in green. It goes far beyond other grammar tools to catch even the trickiest errors. You can also change the tone or style of your writing by selecting text and using the "AI tools" button at the top.

To get started, paste in something you're working on and edit away. Or, click the Write button to hide highlights and compose something new!

Write Edit Feedback

Readability ⓘ 
Grade 8
Good.

Words: 185
[Show more stats ▾](#)

1 of 13 sentences is very hard to read. ⓘ

1 of 13 sentences is hard to read. ⓘ

Find grammar and spelling issues with Editor Plus.
Upgrade

2 weakeners. ⓘ
[View details](#)

1 word with a simpler alternative. ⓘ

Want to learn how to use Hemingway Editor?

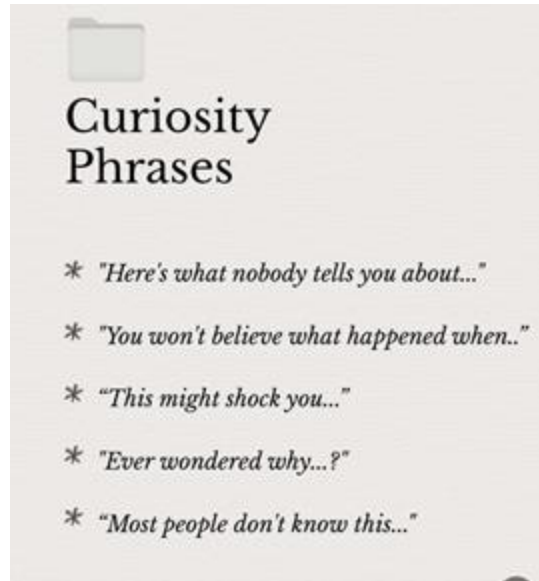
Open Tutorial

© 2013-2025 38 Long LLC

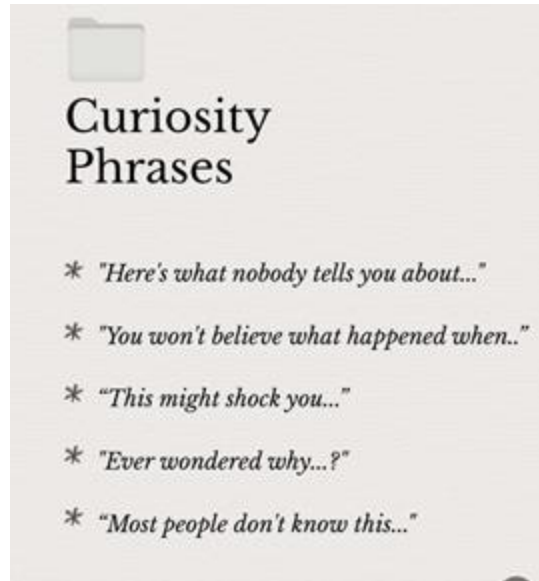
04

They know how to “hook” people in


How do you get someone to pay attention?



Email Subject Lines, First Lines of Social Posts




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..."*



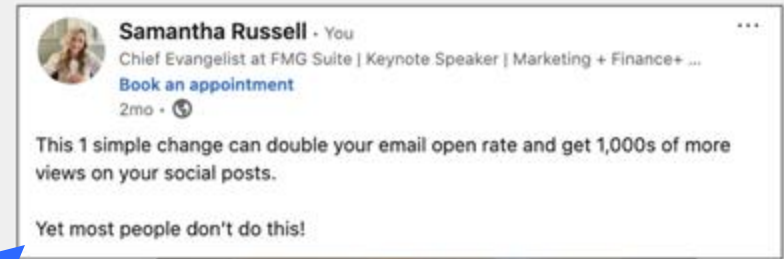
Problem-Solving Phrases

- * *"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..."*

Why Should Someone Care?

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

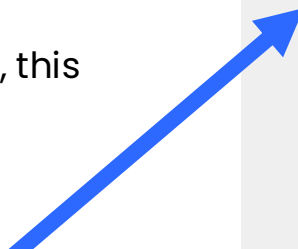
Before posting or emailing – ask
yourself: **WHY should someone care?**



Social Post Example:

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

We all want to avoid costly mistakes



Youtube Example:

Giving Retirement Planning Advice
that is NOT just Financial

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



Popular Retirement Videos ▶ Play all



If you're in your 50s or 60s, watch this. Life Lessons from...

Streamline Financial
3.2M views • 7 months ago



They Retired 10 Years Early Due To 3 Things

Streamline Financial
114K views • 11 months ago



The Month You Retire Really Matters

Streamline Financial
675K views • 8 months ago



9 Things to STOP DOING After 55 To Enjoy Life More

Streamline Financial
1.1M views • 10 months ago



7 Things Happy Retirees Do Well. Retirement Planning...

Streamline Financial
180K views • 3 years ago



CFP® Explains: How to Organize Your Retirement (...)

Streamline Financial
354K views • 1 year ago

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**



Would you consider your advisors' frequency and style of communication when deciding to retain his/her services?

All Respondents

● Yes ● No

88.2% 11.8%

More than \$500K Under Management

92.4% 7.6%

Would you consider your financial advisors' frequency and style of communication if you recommend his/her services to a family member or friend?

All Respondents

● Yes ● No

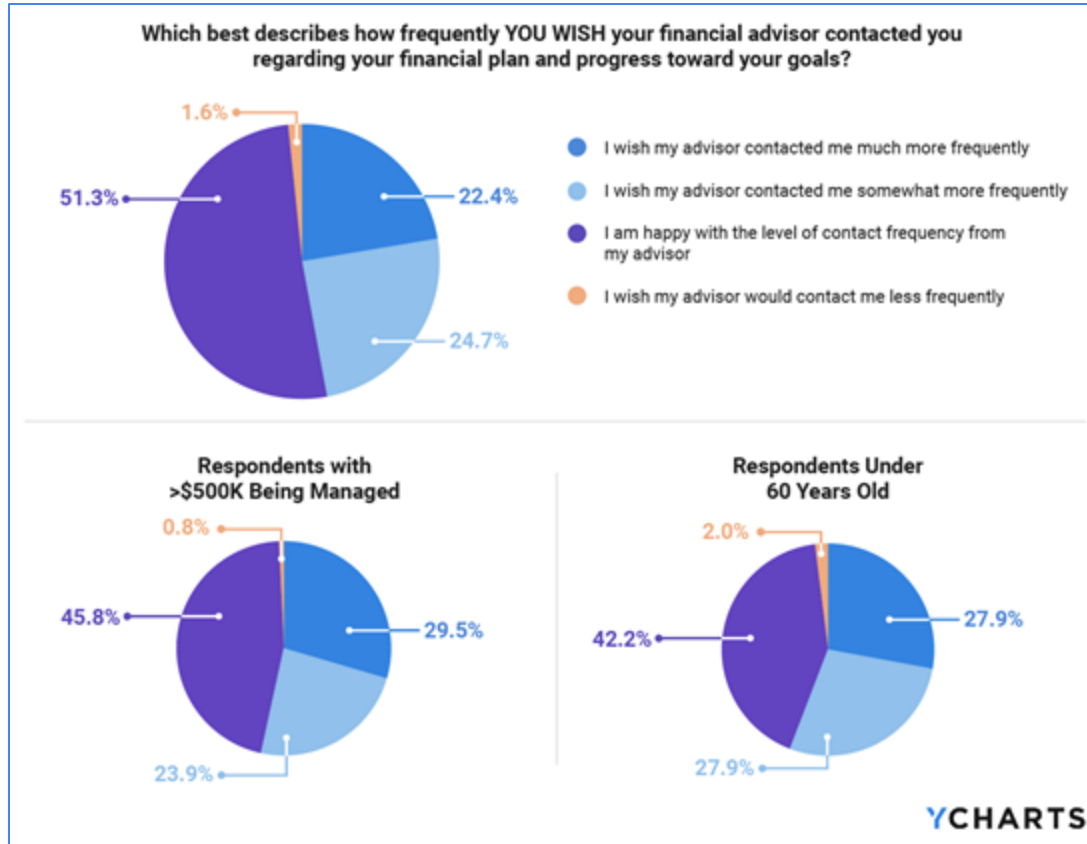
89.7% 10.3%

More than \$500K Under Management

90.2% 9.8%

Source: 2024 Ycharts Survey

Communication is KEY to Organic Growth



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%



© kitces.com LLC

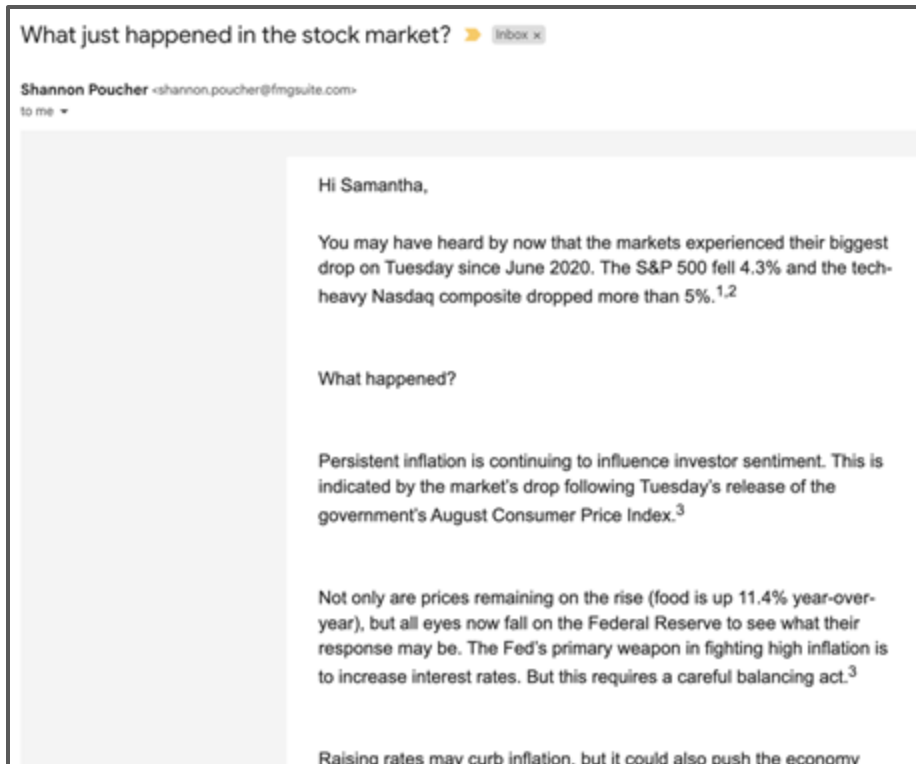
Drip Email Marketing

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



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, Ogilvy
- 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

S

Samantha Russell

✉ srussell@fmgsuite.com

<input type="checkbox"/>	☆	👉	Samantha Russell	Inbox	Top takeaways from our Ask Me Anything Live Event ?	- Hi Samantha, I hope you enjoyed our ...	Aug 23
<input type="checkbox"/>	☆	👉	Samantha Russell	Inbox	Fwd: What marketing questions are on advisors' minds? - srussell@fmgsuite.com	> Hello Samant...	Aug 20
<input type="checkbox"/>	☆	👉	Samantha Russell	Inbox	What marketing questions are on advisors' minds? - Hi Samantha, Have you ever wanted to ask.....		Aug 20

Popular videos

How Do the Affluent Find a New Financial Advisor?...

17K views • 4 years ago

CC

Marketing for Financial Advisors in 6 Easy Steps

13K views • 6 years ago

CC

7 Social Media Post Ideas Proven to Work for Financial...

6K views • 3 years ago

CC

How Your Lackluster Website is Hindering You From...

4.7K views • 5 years ago

CC

6 of the Biggest Marketing Opportunities for Financial...

3K views • 3 years ago

CC

Samantha Russell • You

Chief Evangelist at FMG Suite | Marketing + Finance+ Tech | Inve...

2mo • Edited •

Can you think of a business or person that you are familiar with... simply because you have seen their videos in your feed? ...more

VIDEO

Workshop for Advisors

1:30 1x

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.

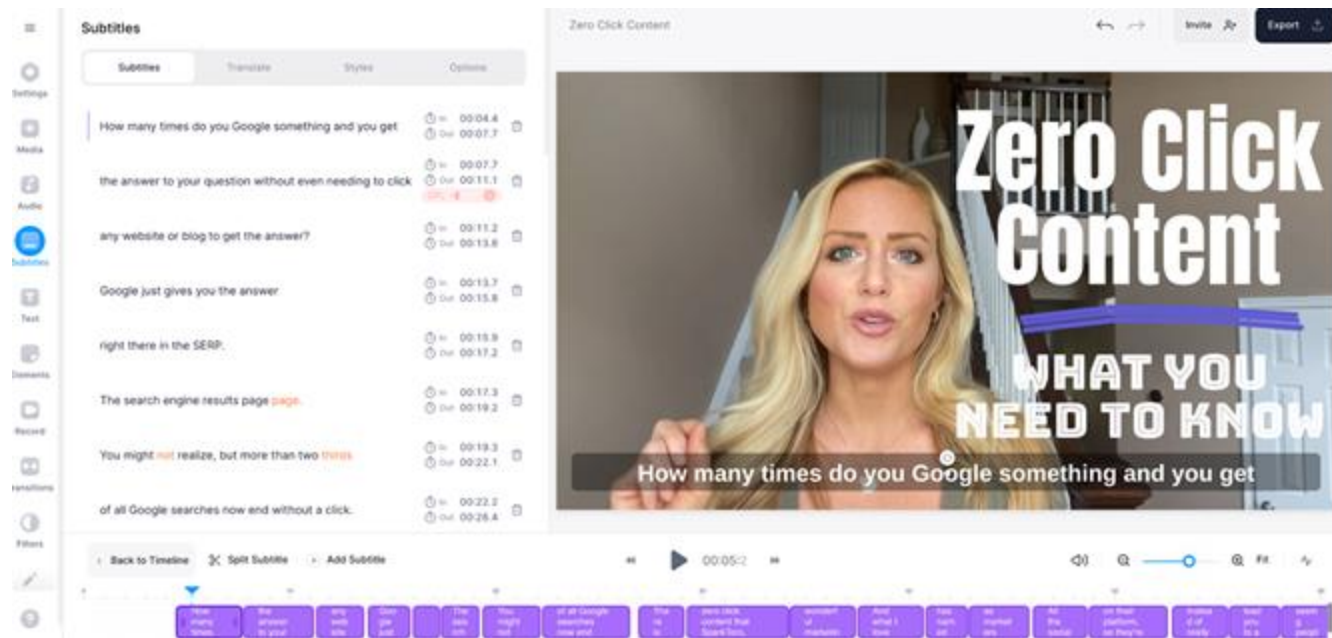
Airdrop it !

**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

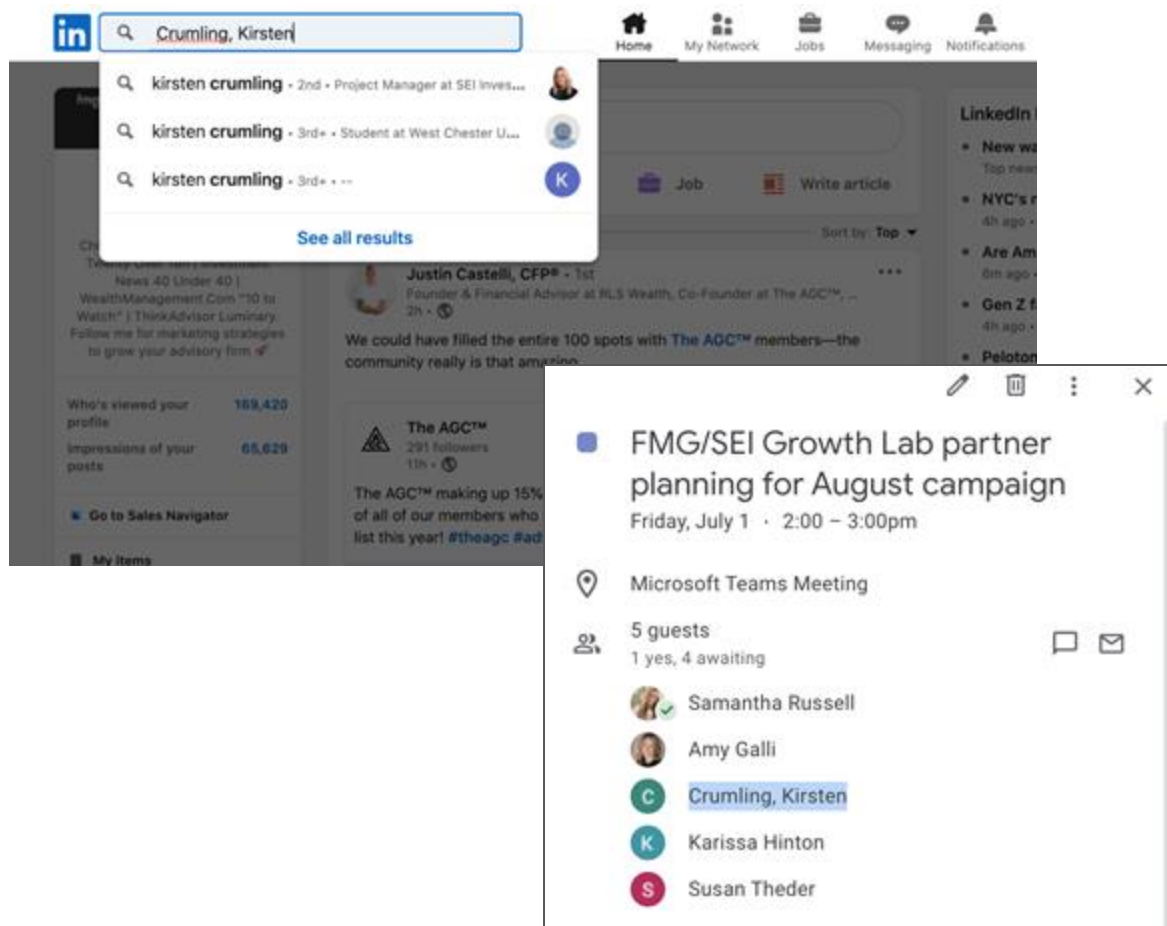
Every Friday, Go through the last 5 days of your calendar and emails

Step 2

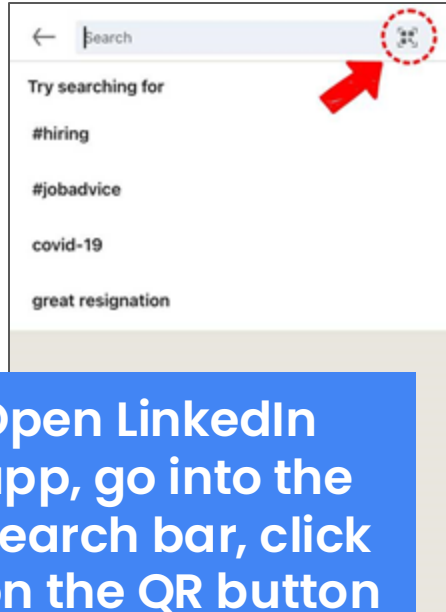
Copy the person's name or email, look them up via LinkedIn

Step 3

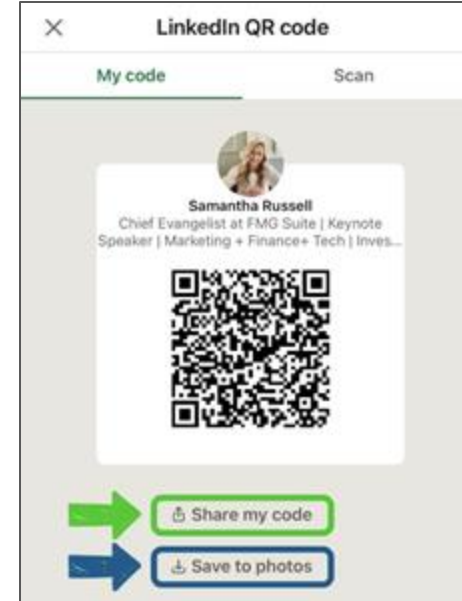
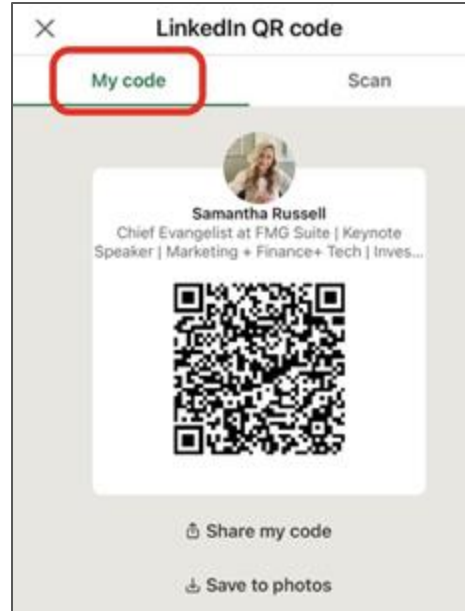
Invite them to connect on LinkedIn—that's it!



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



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
sam@strategic-advisor-marketing.com