

How to Drive Growth with AdvisorStream's Scroll-Stopping Marketing

7

Key Stats About Investor Engagement

Stat #1

Clients are willing to leave an Advisor

31% of investors are considering leaving their Financial Advisor in the next 12 months.



EXIT

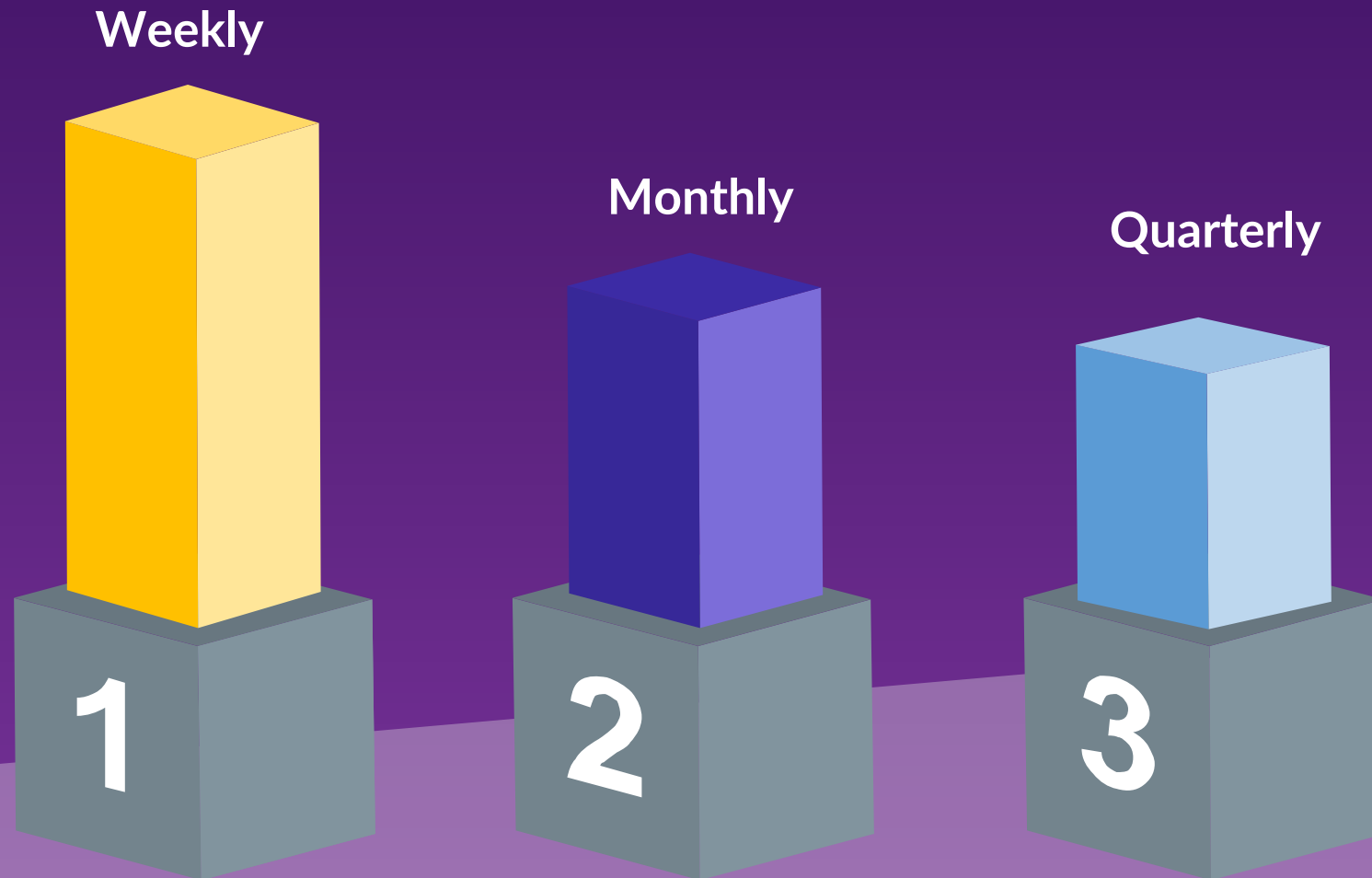
Stat #2

Top reason clients leave an Advisor



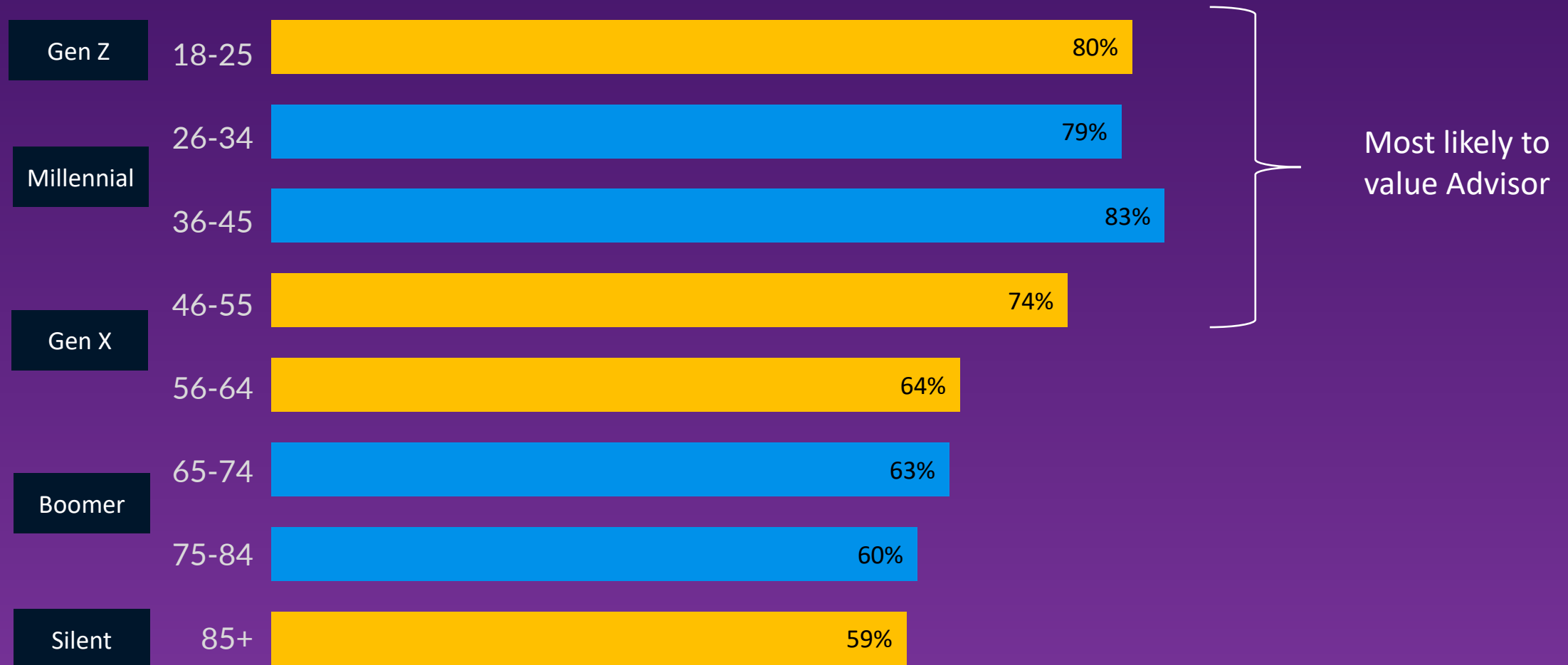
Stat #3

Investors want to hear from Advisors regularly



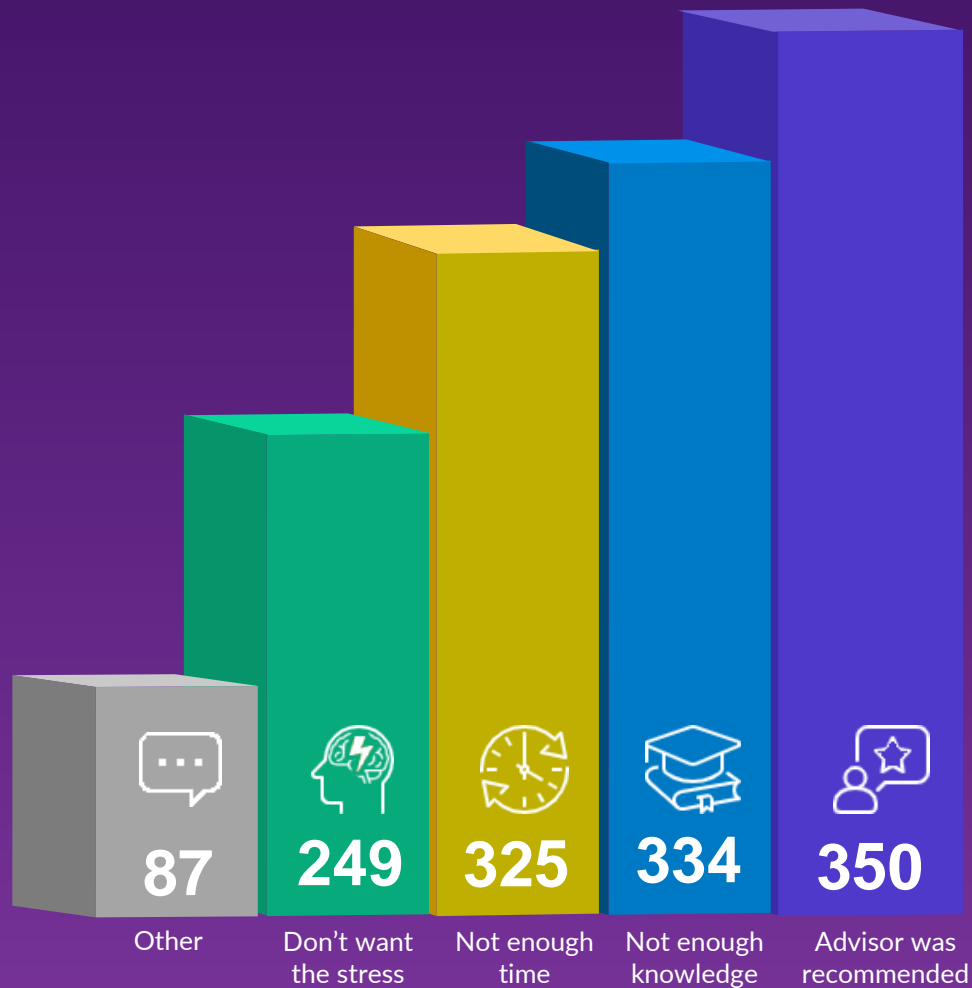
Stat #4

Younger investors more likely to value an Advisor

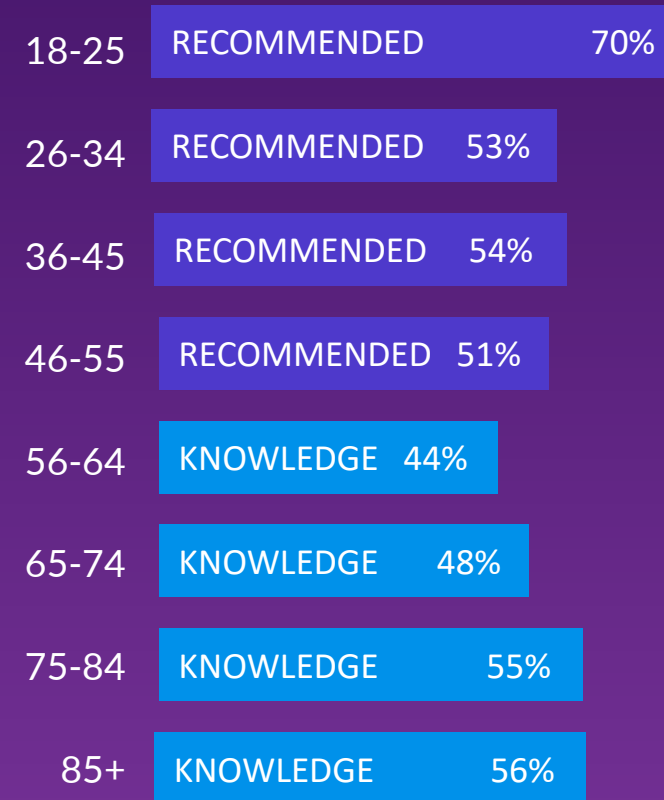


Stat #5

Top reasons investors choose to work with an Advisor



Top reasons by age



Stat #6

Easier to drive growth when clients are engaged

Engaged clients refer **5x** more than disengaged clients.



Stat #7

Advisors are losing business due to lack of digital tools

77%

Said they've lost business due to a lack of digital tools to interact with clients.



AdvisorStream is a digital marketing platform that...

Helps Advisors



Grow share of
wallet



Deepen client
relationships



Attract new
leads



Increase
AUM

Helps Wealth Firms



Stay compliant



Attract & retain
clients



Eliminate risks
on marketing



Optimize ROI

All your growth marketing initiatives working together

Build relationships. Grow your business. All in one platform.

Social Media



Email Marketing



Client Newsletters



Lead Nurturing



Lead Optimized Pages



Website Integration



Unlimited Content



AI-Powered Insights



Smart Automation



Greeting Cards



Heroic Support



Robust Compliance



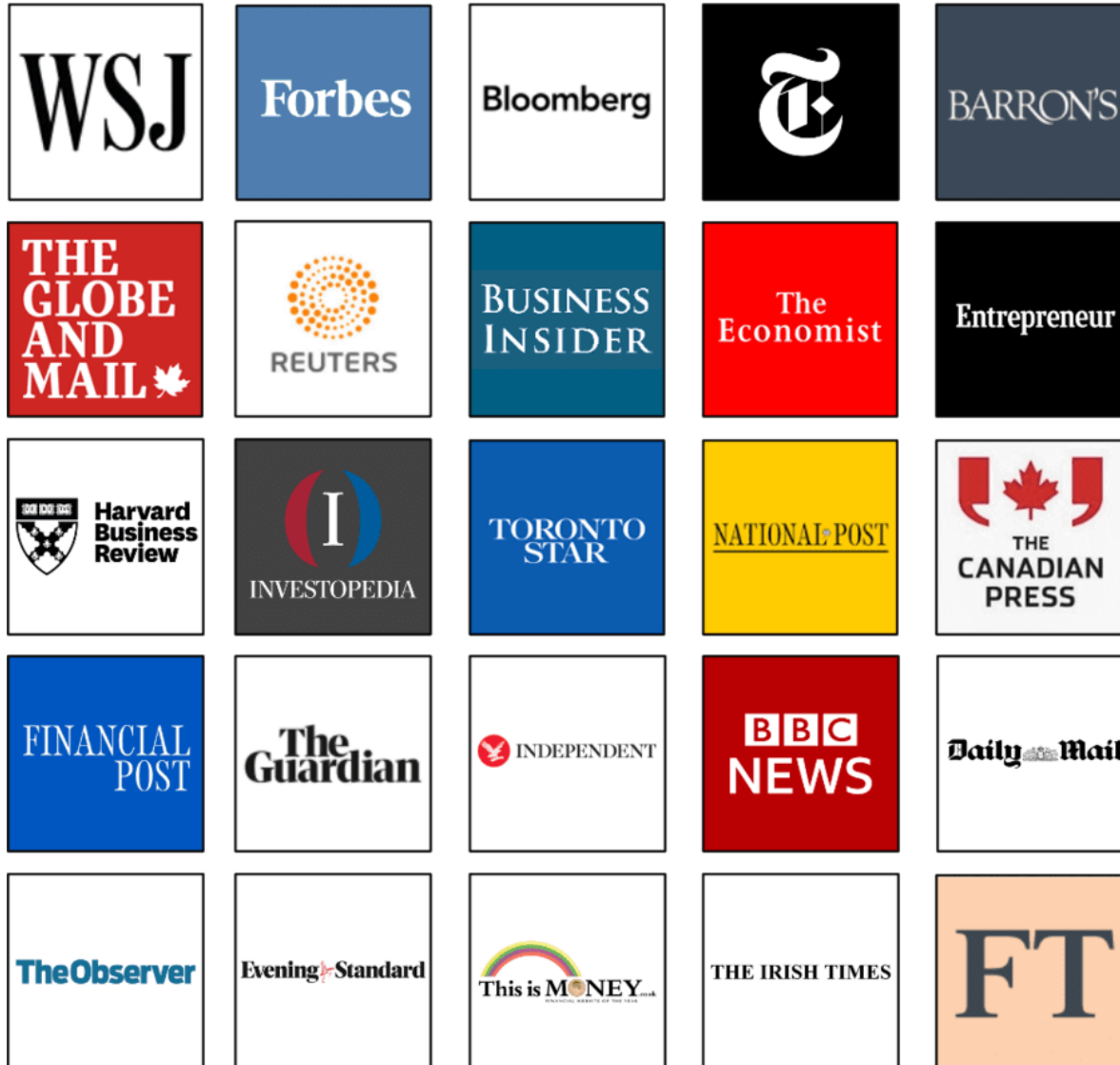
Drive growth with an investor first approach to marketing

Build relationships. Grow your business. All in one platform.



World-class Content Investors **ACTUALLY** Enjoy

Licensed content with no paywalls, ads or distractions



+

Advisor Content

Firm Content

+

Data-Driven
Automated
Personalization

Get an *Unfair Advantage* Over Your Competitors

AdvisorStream delivers an unrivaled investor experience.

- ✓ Content on virtually any topic/theme
- ✓ Fresh content added daily
- ✓ Licensed legally for Advisors usage
- ✓ Lead optimized and Advisor branded pages
- ✓ Firms/Advisors can submit their own content
- ✓ Expertly written content by recognized journalists
- ✓ Distraction free experience – no ads or paywalls



AI-powered Insights Uncover Revenue Opportunities

AdvisorStream "learns" as investors interact with your communications helping to uncover new growth opportunities.

- ✓ Uncover client/prospects' interests & key life events
- ✓ Intelligently recommends next best content to send
- ✓ Real-time reporting identifies engaged prospects
- ✓ Detailed reporting on client engagement and interests

The screenshot displays the AdvisorStream interface for a user named Tyler Johnson (tyler@example.com). On the left, engagement metrics are shown: 144 Opens, 27 Unique Opens, and 33 Views. Below these is a 'Frequency Preference' set to 'Any Time'. On the right, there are tabs for 'Opens', 'Content Views', 'Shared Content', and 'Recommended (4)'. A message states 'Based on Tyler's interactions, we suggest' followed by category tags: 'Financial planning', 'Travel', 'Parenting', 'Wellness', and 'content.'. Four content recommendations are shown in a grid:

- BI** October 5: A 'frugalist' software developer who saves 60% of his income reveals how he lives on \$1,000 a month.
- WSJ** October 3: How to Score the Best Luxury Hotel Deals: 5 Expert Tips. We asked industry insiders for the best advice on getting a discount at...
- F** October 6: How To Minimize Your Child's Student Loan Debt. In several recent standoffs over the...
- E** October 5: Focus on These 3 Areas of Your Mindset to Take Charge of Your Life.

Ready to Get Started?

Learn how AdvisorStream can help you drive
revenue & client engagement

advisorstream.com/pareto