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5 Tips for Growth with Advisor Marketing

Overview

Broadridge surveyed over 400 financial professionals to identify opportunities that could help Advisors drive growth in times of market volatility.

Here are 5 key recommendations based on the research findings.

1. Spark action with ongoing education
2. Target your outreach and promote regionally
3. Attract clients with relevance
4. Measure and optimize for better results
5. Driving growth without sacrificing compliance

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Recommendation #1:

Spark Action with Ongoing Education

53% *of Advisors share educational content with clients regularly, despite clients wanting more.*

- An Advisor's value transcends returns, encompassing mentorship and coaching
- Empower clients to make informed decisions by providing educational resources
- The average investor prefers to receive weekly communications, according to a study from Dow Jones

Recommendation #2:

Target Your Outreach and Promote Regionally

27% *of Advisors generate business outside of their local area.*

33% *intend to expand their prospecting beyond their locality.*

- Advisors can virtually meet with clients, enhancing convenience and flexibility
- Growth-focused Advisors are expanding their digital presence to reach investors in neighboring regions through digital channel
- As you expand your geographic reach, ensure your messaging remains highly relevant to your intended audience

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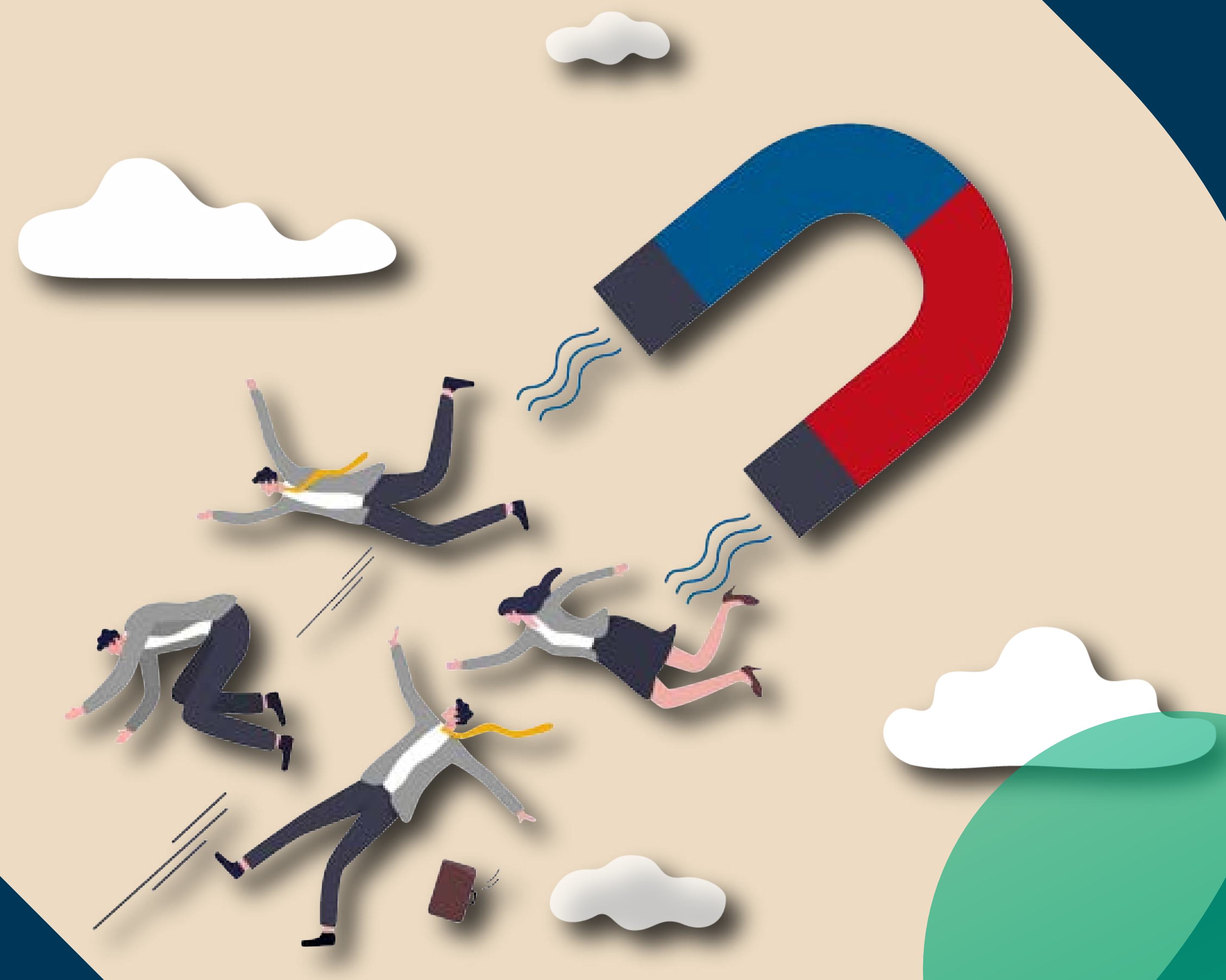
Recommendation #3:

Attract Clients with Relevance

34% *of Advisors stated their website does not help them generate leads.*

- To convince visitors to share their contact details, your website should communicate expertise and relevance
- Make it easy for prospects to do business with you by sparking conversations that add context to the world around them



Recommendation #4:

Measure and Optimize for Better Results

> *If you can't measure it, you can't improve it*

- Define your marketing objectives (find new clients, retain value of book, grow your AUM)
- Ensure you have the tools to measure and analyze your marketing

Recommendation #5:

Driving Growth without Sacrificing Compliance

56% *of Advisors felt that compliance was one of their main challenges to driving growth.*

- Marketing can be overwhelming – especially when it’s not your full-time job
- AdvisorStream's digital marketing platform automates the process of finding compliant content to share across your digital channels and communications

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Learn how to drive growth with marketing investors enjoy at AdvisorStream.com

Contact us at marketing@advisorstream.com