



FINANCIAL  
MARKETING  
INSIGHTS FROM  
INDUSTRY  
EXPERTS



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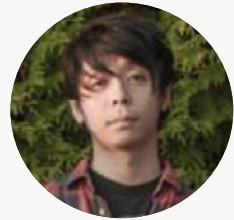


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What is

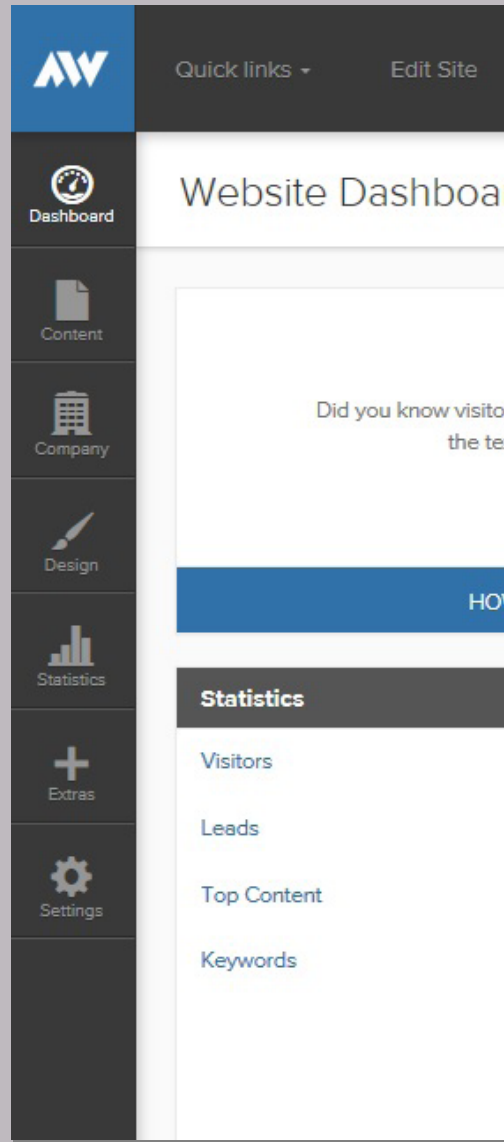
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# Introduction



In the face of social media, mobile, digital content, robo-technology and the like, marketing your financial firm has become more challenging than ever.

As traditional marketing avenues continue to break down, be transformed and refashioned, advisors must learn each new language that current and prospective clients speak in order to communicate their firm's unique value.

To help you navigate these newly created spaces, we reached out to the best and brightest in the business. Read on for excellent financial marketing insight from 18 industry experts.

# “Understand who you are and who you work best with.”

Jud MacKrill  
Director of Design & Marketing  
[www.orionadvisor.com](http://www.orionadvisor.com)



Many advisors seem to try to be all things to all people, and unfortunately, it ends up making them seem generic.

The truth is much different. Every business, every client, and every person is unique. No one is generic. Each one of us has a unique perspective, a special story to tell, and a way specific to ourselves that we can use to serve others.

The advisor that understands who they want to serve will find that their marketing strategy comes much easier. The form of the ideal client doesn't matter; what does matter is that each advisor knows who their ideal client is, what they want, and how they can help them reach their goals.

At its core, understanding yourself means knowing how to be yourself. While “being yourself” can lead into some murky waters, Seth Godin lays it out as simple as possible: being authentic is revealed by consistent behavior. If you act out what you believe, even if you doubt yourself, then you are what you are.

We live in a world filled with advertising that leads to disappointment and relationships where the person who shows up for a dinner date doesn't look anything like their profile photo.

Authenticity is something that clients, as humans, crave to experience. Advisors who build their marketing strategies around their truly held beliefs, not whatever the flavor of the month is or what they perceive people want them to say, will discover the most long-term reward in their marketing efforts.

# *“Get familiar with how to make good videos.”*

Bill Winterberg  
CFP, Founder, President  
fppad.com



This means that someone in your firm should have experience with the creative process, pre production, the actual video shoot (and the equipment required), post production, and distribution. Hiring or contracting with a person or team will increase accountability and consistency in the use of video to complement existing marketing activities.

Psst.. for more information on this topic [click here](#)





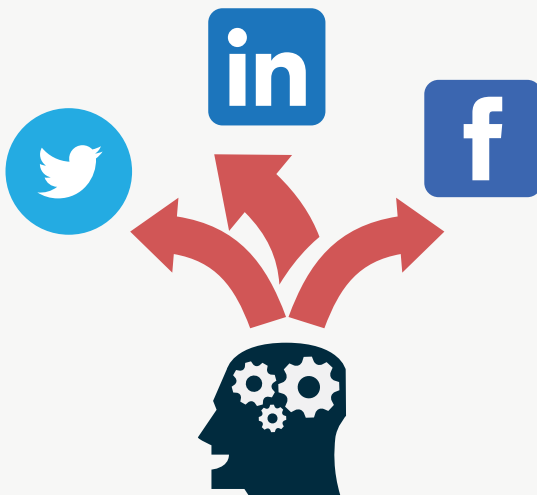
# *“Develop a social media engagement strategy.”*

Charlie van Derven  
President  
[www.social-advisors.com](http://www.social-advisors.com)



While a number of companies in our industry are offering turnkey social media solutions, setting up an automated social media strategy is unlikely to create the results you seek. Regardless of platform, the key to successful social media business development is to be involved.

The following steps will help you build an engagement strategy that leads to interaction with influential people and brands, which will lead to greater exposure and a larger audience of opportunity.



### **Step 1 – Identify Your Advocates and Centers Of Influence and Connect With Them**

Each of us has a list of personal and professional advocates, clients, prospects, and Centers of Influence that help drive business and referrals. Connect with, follow, and like as many of those people as possible. Remember that COIs in social media may include brands outside of traditional COIs like CPAs and Attorneys. Include media and bloggers that may be able to help create more exposure for your brand and content.

### **Step 2 – Develop A Daily Social Media Engagement Routine**

Social media is not a sometimes activity. You need to log in daily, if not multiple times per day, but if you are like me, you're constantly plugged into your smart device anyway.

### **Step 3 – Create Strategic Interaction**

By consistently monitoring your various social media platforms, you will quickly learn who is driving interaction. Each day, like, comment, and share interesting content. Make sure that you are targeting interaction with content from people and businesses that can help you create more exposure and opportunity.

Don't think that just because you are automatically sharing content you will see great results. You have to be present and social for social media to create the business development opportunities we are all seeking.

# “Understand who you are and who you work best with.”

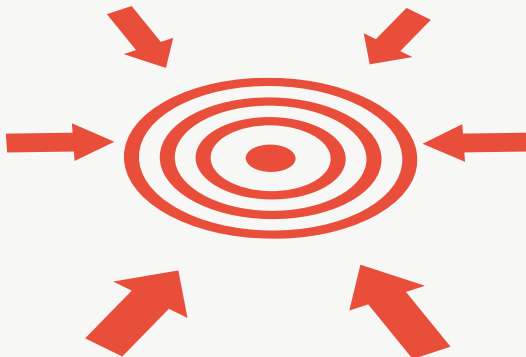
Michael Kitces  
Director of Research, Publisher  
[www.pinnacleadvisory.com](http://www.pinnacleadvisory.com)



Beware the biggest trap in advisor marketing, which is to continually cast a wider and wider net trying to find prospective clients.

The more of a generalist you are, the more people you can work with, but the fewer consumers will want to because you're no longer perceived as a specialized expert who can solve their problems. [The solution is not to keep casting a wider net, but to narrow your focus and have a clear niche or specialization](#) – there will be fewer prospects to catch, but you can get them all!

Click here to download our Client Personas template to define and target your audience.



# “Court the press.”

Dave Drucker  
Journalist, Financial Advisor  
[www.technologytoolsfortoday.com](http://www.technologytoolsfortoday.com)



So much of what we call marketing these days is digitally-based, but in the 80s and 90s I successfully employed an old-school method that still works today: courting the press. It's very simple. Just follow a couple of writers for your favorite publication (e.g. Wall Street Journal) and learn what their specialties are and what they look for in the way of topics. As you get to know their 'beats,' think of ways you can assist them.

For example, a writer I got to know at the Journal wrote primarily on insurance. The more I read her column, the more ideas I generated for stories. I would pitch these ideas to her and, as she got to know my strengths as an advisor, she would write on my suggested topics and interview me for her piece. Prospective clients in my local area would then see her article and call me for an introductory planning meeting.

Be aware that this process takes time. Trust between any two individuals is not built in a day. You may find yourself pitching endless stories to journalists without a response at first. Don't give up.

As important as it is to build trust with your clients, it's equally important to do so with other professionals. Whether it's the client's other advisors, or outsiders like journalists who serve as a resource for clients and advisors, it's critical that you act professionally and respect their mission. A journalist is constantly on deadline and may not pay much attention to your initial contact with them. But hang in there; once you get their attention, your association can become a continuous source of new client relationships.

# *“Be a high trust leader in the connection economy.”*

Marie Swift  
President & CEO  
[www.impactcommunications.org](http://www.impactcommunications.org)




In today's economy, especially for financial advisors, prospective clients want to connect with and trust the companies that they select. It's a lot easier to identify with a company that is the expression of its people and demonstrates some humanity than one that seems like an emotionless robot.

In his book, [The Icarus Deception](#), marketing genius Seth Godin says we must become 'high trust leaders' in this new 'Connection Economy.' A high trust leader creates work that is worth connecting to and enables their followers (both employees and customers) to find their inner creativity rather than just do what they are told.

How would you describe your company's 'voice'? Since sounding human is the best way to connect, if you're not sure of the answer, you might look to see if your company communications (both internal and external) are a little impersonal and inconsistent.

It can be a tricky thing, finding your voice as a business leader. But find it you must if you are to stand out in the sea of sameness in a noisy, info-saturated world. A consistent message that hinges on authentic character is key.



Does your marketing material, website, blog and social media content sound canned? It's time that it sounds like you. There's an old saying: People do business with people they like and trust. It is as true today as it ever was – only more so, perhaps, given the ability for each of us to build an online presence that adds value for a select group of people.

Every human being silently filters each new interaction or brand personification through this filter: “who are you ... and why should I care?” If you can't pass the ‘so what?’ test, your business will never really be successful.



Learn more from Marie Swift on the importance of creating a strong brand for your financial firm [here](#).

# *“Maintain a human touch to your marketing.”*

Corey Westphal  
President  
[mobileassistant.us](http://mobileassistant.us)



With so much technology available to advisors, it seems sensible and efficient to digitize client communications. If you want to maintain client connections – setting up automated drip campaigns seems logical. If you want to reach new prospects – relying on social media to post the latest financial tech news may seem the best use of your time.

Technology tells us that digitizing our lives is smart, efficient, and practical; yes, it can oftentimes be all of those things. The most important piece of the marketing puzzle doesn't involve technology, however; it's the 'human touch' that will set you apart and leave the biggest impact with clients.

The challenge for advisors is to determine which technology should be adopted that will be most beneficial in the quest to communicate with clients in the most human way.

For instance, the 'human touch' to Mobile Assistant's mobile dictation has no high tech substitute. For client meeting notes, accuracy is imperative. Human, professional transcriptionists trained in the latest financial and insurance terminology produce the highest quality notes. This not only saves advisors time editing, but protects them against inaccurate translation of critical client meeting documentation.

There is something to be said for a personal touch; technological developments, as remarkable as they are, can't fully replace relationships built on one-on-one interaction and a 'human touch.'

This principle is one that I have based my business on and can serve as a great reminder for advisors that, while relying on digital marketing efforts, the 'human touch' combined wisely with technology, will take your marketing efforts to the next level.





# “Referrals can be the lifeblood of your practice.”

Peter Montoya  
President  
marketing.pro



Building your business requires communicating with people. Every field benefits from establishing trust between the professional and the person (or people) to whom they provide service. This is especially true for Financial Professionals. One area where this is critically important is referrals, which can be the lifeblood of your practice.

If you're not sure how to get referrals, or what to do once you have them, hopefully these tips can help.

## Here's a closer look

### **Leaders don't have to ask for referrals**

You likely looked up to someone in your life as a trailblazer and leader; they likely led by example and by becoming a hub for professional activity. Organizing groups, events, and being the professional with a reputation for bringing people together will cause your colleagues to want to make referrals to you, unsolicited, because getting people in touch with you will make them seem connected and important by extension.

### **Follow up the next day**

Would you buy fresh bread, leave it untouched on the counter for a few days, and be shocked to find it growing stale or moldy? Referrals don't stay fresh forever, either. Strike while the iron is hot. Following up quickly shows that you value your referrals and that you're attentive when it comes to building business.

## **Remember that referrals are people**

When giving a referral, you're making an introduction between two people, so be sure to have information about that person handy to relay to your colleague. Inform them about their family, professional life, and interests. Conversely, when you get a referral, be full of questions about this person. Everyone has a story, and part of your job is to learn that tale.

## **Closing 'tricks' are for amateurs**

You might see so-called business gurus offering 'Jedi Mind Tricks' designed to turn referral into business contacts, and far be it from me to argue with success, but this feels like a hollow victory, and more than a little disrespectful. Your business is in people, so build your business on substantive human interactions and integrity rather than flimflam and illusions. There's a reason stage magicians 'retire' their tricks - people figure them out and get tired of seeing them.

# “Adjust your attitude - you CAN do marketing!”

Kristin Harad  
Marketing Trainer, Speaker, Coach  
[kristinharad.com](http://kristinharad.com)



“Marketing doesn’t come naturally to me” and “Marketing isn’t my strong suit” are just a few of the excuses financial advisors rely on to justify why they fail to implement a marketing plan.

Like it or not, you have to execute some level of marketing to grow or maintain a viable practice. A simple attitude adjustment is the first step to achieve marketing success.

## Here’s a closer look

### **“I don’t know what to do or how to do it.”**

Take a class, watch a training video, read a book. Talk with other advisors. Pick one marketing initiative and break down the steps. Focus on that effort, complete it, and move on to the second effort.

### **“I’m afraid I’ll look foolish.”**

You are your own worst critic. Marketing today is about authenticity. Be yourself. Clients want to work with humans. Write in your natural style; record video in the same manner you speak with clients. You don’t have to be high-tech or 100% polished to gain results.

**“I fear I’ll make a mistake.”**

You will! Trust that you will know how to ‘make it right’ when you do, or relax knowing that any single marketing effort dissipates quickly online. You’re better off succeeding four out of five times than trying nothing. Talk with Compliance before you market and operate within the boundaries.

**“I don’t have time or energy.”**

Sounds like you need an assistant, paraplanner, or support in other areas of your life. How’s your nutrition, sleep, and exercise?

**“I don’t want to bother anyone.”**

Communicating too often is rarely a risk for financial planners. People have to hear from you frequently if you want to stay top of mind. Take pride in what you have to offer and share valuable content.

# “Be specific with clients about who you are looking for.”

Stephen Wershing  
President

[www.theclientdrivenpractice.com](http://www.theclientdrivenpractice.com)



All advisors would like to get more referrals, and referrals are the largest source of new business for most advisors. But did you know that one of the biggest obstacles to getting referrals is that your clients don't know who you would like to meet?

Many advisors who actually tell clients that they would like to meet new people, and may even ask for referrals (not a great idea), are not specific about who they want to meet. They might say something like, “anyone who needs an advisor” or “anyone with more than \$100,000 to invest,” which is not helpful. Your clients, for the most part, don't know whether their friends need an advisor or how much is in their portfolio.

Instead, clarify the kinds of problems that you focus on or are uniquely qualified to solve:

- “I take widows through a specific process to help them understand what decisions they need to make and when they need to make them after losing a loved one. If you ever hear about someone who has just lost a spouse, I would love to be of service to them.”
- “We have a checklist to help first-time parents make all the necessary adjustments to their financial plan when having a baby. If you know of anyone who is expecting, we would love to offer one to them.”

Providing your clients with something that will trigger their memory, reminding them to mention you, will help make sure they end up referring you when the opportunity arises.

# “Get on Twitter.”

Amy McIlwain  
VP of Social & Digital Strategy  
[www.moorecommgroup.com](http://www.moorecommgroup.com)



Social media is growing up and news that breaks on Twitter is now news that moves markets. Real tweets have the power to cause political tension, end careers, and find a kidney. When people tweet, not only does the world listen, but the world reacts, and that world includes investors.

## Here's a closer look

**1) Your audience is on Twitter** — With over 645 million active users, it isn't a question that your audience, in some form or another, is on Twitter. By having a presence, you build credibility for your brand and open the doors to millions who may be interested in what you offer.

**2) Access to the media** — This is huge. Accessing local news stations and publications can be a daunting endeavor—especially for busy financial professionals. With Twitter, you have instant access to people and publications that will earn you the exposure your brand needs.

**3) Reach the wealthy** — Because there are no connection barriers on Twitter, you can connect with influencers and high-net worth individuals. According to recent research conducted by Scorpio Partnership, a consulting firm, more than 40% of high-net-worth individuals younger than 50 viewed social media as an important channel for communicating with their banks.

**4) Keep yourself in front of prospects** — [Jude Boudreaux](#), CFP, is a great example of how advisors can use Twitter. He merely engages in conversation, and keeps on the lookout for people who just might be looking for a financial planner. Perhaps more importantly, he serves as an educational resource.

The Twitter-sphere is no longer home to simple, 'pointless' information. It can become the biggest impetus behind what your clients do with their money. There is often talk about the power of words, and when it comes to the financial world, 140 characters maybe the strongest weapon you have.



# “Build communities.”

Bob Veres  
Owner, Commentator  
[www.bobveres.com](http://www.bobveres.com)



I think the most powerful—and also the newest—way to market your practice these days is to create communities around interests that your clients have: philanthropy, career enhancement (for executives), education around money (a good topic for women).

Create advisory boards of clients who will help you define what the community meetings will cover and then invite subject experts (nonprofit executives in different areas, estate attorneys, personal coaches, etc.) who can provide expertise and deliver value. Let clients bring friends to the group meetings and suddenly, in a non-marketing sort of way, you're enhancing the life of people in the community who are not (yet) clients. Some of them will never become clients, but they'll invite others into the community who might be interested in your services.

Only a very few firms are doing this right now, but those that are report several things: that they see more prospects in a more relaxed, positive setting than they ever did before; they feel the gratification of contributing to the well-being of the community; they experience a closer connection with clients; and they discover that the value provided by the other members of the community greatly enhances the value that they (the advisory firm) can provide. People are fundamentally herd animals, and when you tend a herd around an area of common interest, your marketing prospects increase dramatically.



# “Use a CTA and CRM tool.”

Jennifer Goldman  
COO & Founder  
[www.myvirtualcoo.com](http://www.myvirtualcoo.com)



An effective website and industry specific CRM allow you to accelerate connecting with potential leads! One of the best marketing ideas is to make sure your website is screening out those who are not a match for your services while also facilitating the connection between those who are.

To accelerate the connection with qualified connections, provide a Call-to-Action, like a contact form, on your website that automatically allows web visitors to schedule a call or meeting with your firm. Prospective clients that have a need and might be a match will be willing to fill out your form and schedule a call - with no need for help from someone on your staff, they can do this at all hours of the day or night. For leads that are tentative, and thus not a match for your services at that time, you should provide a subscription button to your newsletter so you can drip them information until they are ready.

The beauty of both marketing methods is that they quickly identify your lead's level of interest, they flow all of the collected data into your CRM calendar and notes, and you appear organized and approachable, which are traits that leads are looking for in a financial expert. There is nothing better than capturing interested people into your database, allowing them to choose the method of contact that they're comfortable with, and avoiding the email volley back and forth to schedule a call or ask for information.

As for you and your firm, the win is that all of this lead data gathering and scheduling can happen while you sleep, are on vacation, or busy servicing clients. As the cliché says, it is a 'win win'!

# “Know your customer.”

Michael Laks  
Product Marketing Manager  
[www.riskalyze.com](http://www.riskalyze.com)



This is a term that most in the financial world are familiar with in regards to verification and regulation, but knowing your customer is also one of the most important aspects of marketing. The key to marketing success is to truly understand your target market. Before you can craft your value proposition, come up with messaging, and work all of your marketing channels, you must know who you are targeting, what they want, how they make decisions, what their pain points are, where they look for solutions, and why they need you.

In the same way that you can't recommend a suitable portfolio for a client without knowing their risk tolerance, age and financial situation, you can't effectively communicate your value proposition to your target market without knowing what problems they have, how they look for solutions, and what solutions they are looking for. One of the worst things that you can do is assume that everyone is just like you — unless your target market is financial professionals with your same age and background.

We recommend that you ask your current clients and anyone that you know in your target market what they are looking for in a financial advisor and how they would go about finding one—their answers might just surprise you. Once you fully understand your target market, you can begin drafting messaging and a marketing plan to illustrate how you can solve their pain points.

# “Create an event that actually produces referrals.”

Maribeth Kuzmeski

President

[www.redzonemarketing.com](http://www.redzonemarketing.com)



Do you feel like you deserve more referrals? Do you ask for referrals? Have you ever hosted a client appreciation event with a goal of getting referrals? Many times referral generation results are disappointing. Well, here is a proven referral-generating strategy that isn't a typical client appreciation event and actually generates positive referral results.

One of the most successful strategies I've seen for giving clients a reason to immediately refer is an event called, 'Don't Miss the Boat.' It's similar to a client appreciation event but only clients who have already referred others to your firm are invited. Advisors say to their clients, "Dear Client, don't miss the boat! We're doing a big event on October 15th on the Detroit Star, the dinner boat on the Detroit River. It's going to be a gala event with music and dinner and dancing! But don't miss the boat - because the only people we're inviting are those who have introduced us to potential clients by October 15th."

This event gives clients an immediate incentive to think of someone. Yes, it may be a little gimmicky, but we've never seen this strategy fail. It has consistently produced referrals of 30 or more per event – even from high net worth individuals!

Download our ebook, *Advisor's Ed: Driving Traffic to Your Website*, to learn how to make the most of your events.

# “Find your communication fundamentals.”

Blane Warrene  
Co-Founder  
[www.quonwarrene.com](http://www.quonwarrene.com)



Every business will have its own preferences for how they communicate with clients, prospects, influencers and others. It is a combination of your voice (bringing your offline culture into how you speak to others online), the mediums you use, and the frequency with which that occurs.

Regardless of size and budget, it is key to address these three elements to be effective in modern digital marketing.

## Here's a closer look

**Your voice shouldn't be generic**, rather it should represent the ideas, philosophies and experience you and your team bring to the table with your clients. You want your audience to recognize and distinguish you from peers and competitors. Your editorial calendar should be powered by topics that you tackle day in and day out when delivering services.

**The mediums (text, images, audio, video, et al) matter** - as you can explore dynamic ways to share those ideas effectively in places where you know your clients are engaging online. This allows you the flexibility to create content for multiple destinations. For example, a blog post article that also can be released as a podcast or even a self-playing presentation with narration (screencast).

**The frequency you use should match the rhythms of your content creation**

and be consistent so your audience knows what to expect. Common publishing frequencies for sharing original content range from weekly to twice a month to monthly. You may be sharing and commenting on social networks daily, however, for your own content, pick a frequency and stick with it.

Knowing and planning for these fundamentals is at the core of your strategy for digital marketing. Executing on these fronts in your digital marketing initiative improves your opportunity to succeed as well as enables you to measure and monitor those efforts.

Find out how to communicate your messaging with our ebook, [How to Create Content that Rocks & Converts](#).

# *“Develop and execute a deliberate plan for better engaging your top clients’ families.”*

Jeremy Jackson  
Owner & Founder  
[www.skymarketingconsultants.com](http://www.skymarketingconsultants.com)



Every month there’s a new study reporting the extremely low percentage of client retention once a client’s wealth transfers to an heir. That, coupled with a new generation’s reliance on technology and awareness of alternative investment solutions, spells trouble for many financial advisors — much more they know. Financial advisors should:

- Define engaging their clients’ families as a top business objective,
- Identify topics that these families should consider discussing with one another and working together on
- Develop communication tactics for engaging the families and building new deeper relationships with those families.

Topics can include things such as estate planning, charitable contributions, and other wealth-transfer areas in which you can provide expertise to the family; and tactics can include direct requests to your clients to better engage their families, events, direct mail to those family members, CRM touchpoint messaging such as birthday and other life milestone communication to the family members of your clients, among other things.

Old-fashioned, direct and personal communication tactics may not be the sexiest marketing strategy financial advisors have available to them these days — but it may be the most important for retaining client assets during this time of massive wealth transfer.

# *“Stand out amongst a sea of thousands of financial advisors.”*

Martin Morua  
Relationship Manager  
[www.allbackoffice.com](http://www.allbackoffice.com)



I've read hundreds of value propositions such as: “We help meet your goals, define your objectives, and listen to your needs to develop a plan to...blah, blah blah” and while I'm sure many of these advisors are good, they all mostly sound the same. So how can you stand out amongst this sea of black and white by adding some color to your offerings?

One morning in 2001, while overseeing my advisor service team at TDAmeritrade, a large package of new client applications was mailed to my office from one of the financial advisors assigned to my region. Every single client was a dentist. Huh? Was it a coincidence or deliberate that this advisor only had dentists as clients? Aren't financial planners supposed to work with ANY client that approaches them seeking financial advice and guidance?

This Virginia based advisory firm thought differently, and was targeting a niche. Sure, I knew what a niche was... but in the world of financial planning? They told me that apart from some family and friends, approximately 90% of their clients were in the dental industry. They were deliberately targeting this niche of clients to differentiate themselves from other advisory firms.

That was in 2001, which was obviously pre-social media - pre-Twitter, YouTube, Pinterest, Instagram, LinkedIn and Facebook. Today, advisors can reach a sea of prospective niche clients by using these platforms, as well as by blogging. Advisors must also tweak their websites with videos and user friendly tools specific to their target niche.

Besides my dental niche example, advisors can target millennials, divorcees, teachers, military personnel, widows, LGBT, single parents and more. Word of mouth will spread an advisor's niche specialty over time, and using social media will magnify their value proposition.

[Read this Case Study of another financial firm successfully employing niche marketing.](#)

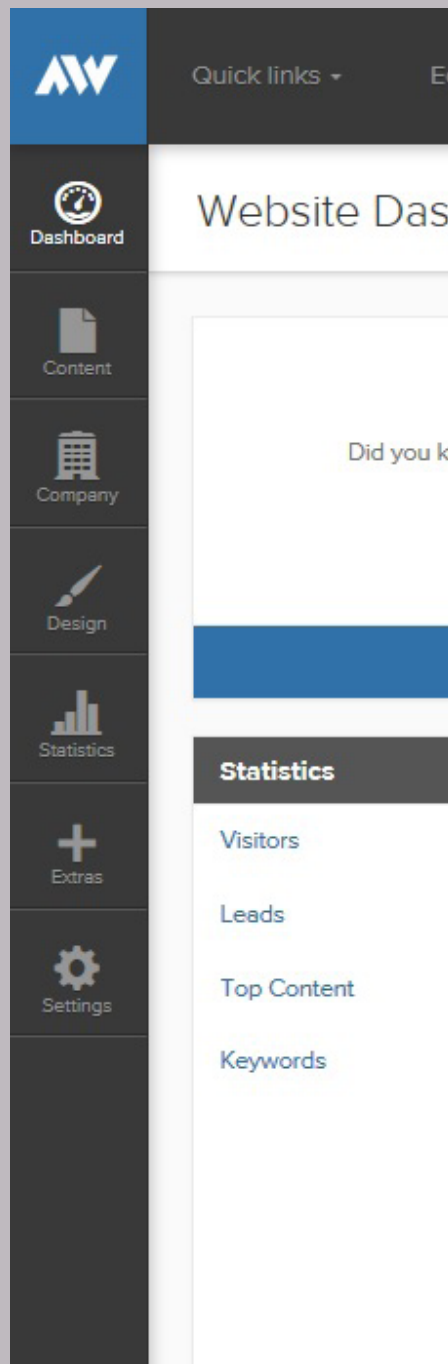


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