

Welcome to the Equisoft Advance Series

Thanks for joining us.
We'll get started shortly.

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CE-credited Webinar

Social Media & Content Marketing Strategies for Financial Advisors



advisor.equisoft.com

Presenters



Ryan Webb

Lead Generation Expert



James Pollard

Host of "Financial Advisor
Marketing" Podcast | Founder of
TheAdvisorCoach.com

A man in a dark suit and light shirt is speaking and gesturing with his hands. He is in a studio setting with a camera and microphone visible. The background is blurred, showing a desk with papers and a laptop.

What are the benefits of social media marketing for financial advisors?

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Equisoft Advance Webinar Series - Social Media & Content Marketing Strategies for Financial Advisors

Why is social media marketing important for financial advisors?



Promote and market your services and brand



Establish a distinctive presence in a competitive landscape

Objectives of Social Media Marketing:

- ▶ Connect with the target audience
- ▶ Build brand awareness
- ▶ Drive website traffic
- ▶ Generate and capture leads
- ▶ Scalability

The number of people to use social media is projected to increase to almost six billion in 2027



- ▶ That's 75% of the global population, more than 7 in every 10 people

Audience engagement



Social media enables direct interaction between you and your audience. This fosters a sense of community and allows for real-time communication, feedback, and conversation.

Engage with your audience **in real-time**

Address customer and prospect concerns **directly**

Provide **valuable insights**

Build a **loyal following**

Effective value proposition communication



A powerful platform for you to communicate your value proposition effectively through compelling content, fostering trust, and driving conversions.

Develop content that **highlights the unique aspects** of your service

Share **client success stories** and **case studies**

Educate your audience on **key trends and topics**

Cost-effective marketing



Social media marketing is cost-effective and has a low barrier of entry.

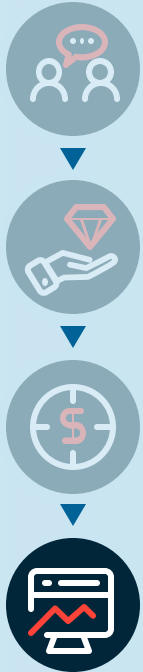
**Low
entry costs**

**Targeted
advertising**

**Flexibility in
budgeting**

**User
friendly
content
creation and
sharing**

Data-driven decision making



Social media platforms offer sophisticated tracking and reporting capabilities, providing valuable data.

Make **informed** decisions

Optimize marketing campaigns

Achieve **measurable** growth

Understand your market

What is the best social media platform for financial advisors?

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Benefits of different social media platforms



Facebook

- ▶ Broad audience reach
- ▶ Community Building
- ▶ Event sharing



Instagram

- ▶ Visual appeal
- ▶ Bite-size content
- ▶ Engagement with millennials



LinkedIn

- ▶ Professional networking
- ▶ Thought-leadership
- ▶ High engagement rate

How to use LinkedIn to generate and capture leads



Learn more about your audience using LinkedIn's built in metrics.



Own your niche by producing thought-provoking content



Conduct a competitive analysis by researching other advisors that share a similar audience as you.



Leverage LinkedIn ads to target your exact customer persona



Optimize your LinkedIn profile
Summary, headline, background image, photo, expertise, experience



Download our free workbook for a step-by-step guide

Having recognized the significance of social media marketing, the next step is crafting a winning content marketing strategy.



How can you strategically develop content that not only engages but also excels on social media platforms?

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Strategy 1

Create and publish thought leadership pieces

By sharing insights, expertise, and innovative ideas, you can position yourself as a credible source within the industry.

- ▶ Thought leadership content is an opportunity to demonstrate a deep understanding of financial matters and showcase your knowledge.
- ▶ This builds trust and credibility with clients, prospects, and peers.

Strategy 2

Create a variety of content that captures the attention of busy audiences

Create a variety of content that is easily digestible, capturing the attention of busy audiences.

- ▶ Thought-leadership content can be repurposed to produce multiple forms of smaller, bite-sized content.
- ▶ This is a way to ensure that your key messages are being delivered and retained by your audience.
- ▶ Examples include: infographics, quotes, video segments, short videos, quick tips.

Strategy 3

Create lead magnets to capture contact information

A lead magnet is a valuable piece of content or offer that advisors provide to their audience in exchange for their contact information (email address or phone number)

Examples of lead magnets include:

- ▶ Case studies
- ▶ eBooks
- ▶ Checklists
- ▶ Whitepapers
- ▶ Free Assessments

Benefits of lead magnets:

- ▶ Identify and track prospects
- ▶ Communicate more efficiency
- ▶ Segmentation and targeting
- ▶ Customized marketing campaigns

Key Takeaways

Know your audience

- ▶ Leverage social media analytics to understand the type of content your audience is seeking


Have multiple strategies to make your preferred social platform work

- ▶ Create a variety of content that captures the attention of your audiences



Know your numbers

- ▶ 80/20 Rule
- ▶ Repurpose the content that has worked for you in the past



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CE credits!**



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[Equisoft Advisor Quiz](#)



Thank you for joining us today!

Don't miss the rest of the
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