

ADVISOR MARKETING SUCCESS

Recently I celebrated my 15th year in business, helping financial advisors with their marketing.

I've survived an industry that spends on average 2% of their revenue on marketing. I've experienced several huge market collapses where the first expense that gets cut is Marketing. These two facts have amazed and challenged me yet my love of marketing and this industry have endured.

I started out designing websites – self-taught. Then I realized websites weren't compelling without a strong message – a brand. After years of branding experience, we've refined our process not only to reflect our advisors stories, but how they can leverage those stories into results – more, and better clients. It's been a wonderful journey, and now with over 10,000 hours of practice, we've really honed our craft.

Since I'm celebrating, I thought why not share my 14 rules for advisor marketing success with you.

If you've ever muttered, "I wish I knew then what I know now", this paper is the perfect opportunity to expedite your advisor marketing IQ. Many of the rules you are about to discover were hard lessons for me to learn. As such, these are not just 14 randomly selected thoughts. These are 'tried and true' principals that I have witnessed over and over to be true. Perhaps the most significant piece of advice I can offer is this: If you want any of these to work for you, it is going to take effort and a will to implement to realize any results. (Maybe I should have called this the '15 Rules For Advisor Success'). Enjoy!