

fmg

2025 Marketing Guide

for Financial Advisors



Save Time, Simplify Marketing, Get Results

In an era when **82% of prospects visit financial advisor websites to learn more about them**,* your digital presence isn't just important – it's essential. Welcome to your comprehensive roadmap for mastering modern marketing in 2025.

Why this guide, why now?

The financial advisory landscape is transforming faster than ever. With digital-first millennials controlling over \$30 trillion in assets, advisors need a fresh approach to growth. This guide transforms complex marketing challenges into actionable opportunities across five crucial pillars:

- **Websites**: Create a high-performing digital presence that converts
- **Social Media**: Build authority and attract clients through strategic content
- **Client and Prospect Communications**: Deepen relationships through targeted campaigns
- **Events**: Generate referrals through memorable client experiences
- **Video**: Personalize your brand and reach broader audiences effectively

This isn't just another marketing guide –
it's your competitive edge in a crowded market.



*[Paladin Digital Marketing](#)

SECTION 1

Website

Add personality to your website to **stand out from the crowd**



Create a Website that Converts

1. Master the 5-Second Test

Create an instantly clear website that communicates who you are, what you do, and your unique value [in less than 5 seconds](#). Use scannable, engaging content that immediately speaks to potential clients' needs.



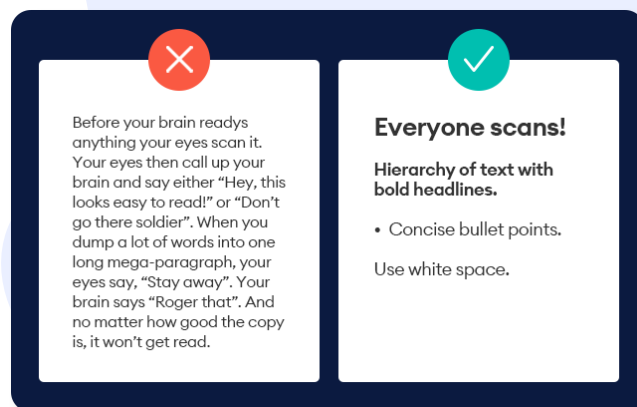
Always test your website with someone outside the financial industry to ensure it passes the 5-second clarity test and effectively communicates your value.

61%

say that if they don't find what they're looking for within 5 seconds, they'll go to another site*

2. Simplify Navigation

Optimize your website structure with **no more than 5 main pages**, with special emphasis on the: **Home, About/Team, and Contact/Get Started** (the 3 most visited sections that will likely determine whether a prospect becomes a client).



3. Audience-Focused Messaging

Transform your website copy by focusing on your clients' perspectives and needs. Eliminate industry jargon and utilize [behavioral science techniques](#).



Replace “We” statements with “You” language that speaks directly to your prospects' desires and challenges, example: “We provide retirement services” to “Your trusted resource for achieving retirement goals.”

4. Add Engaging Elements

Remember, people connect with people. Integrate videos, personal stories, and interactive elements that showcase your personality and help visitors connect with you beyond traditional service descriptions.

88%

88% increase time spent on a website that includes video*



View even more **best practices tips for websites**

*[Forbes](#)

Break Out of Boring – A Website Transformation Example

In the competitive financial services market, [Cadence Wealth Partners](#) needed a website that truly reflected their unique brand identity and connected meaningfully with potential clients.

So, how do they do it?

Authentic Brand Voice

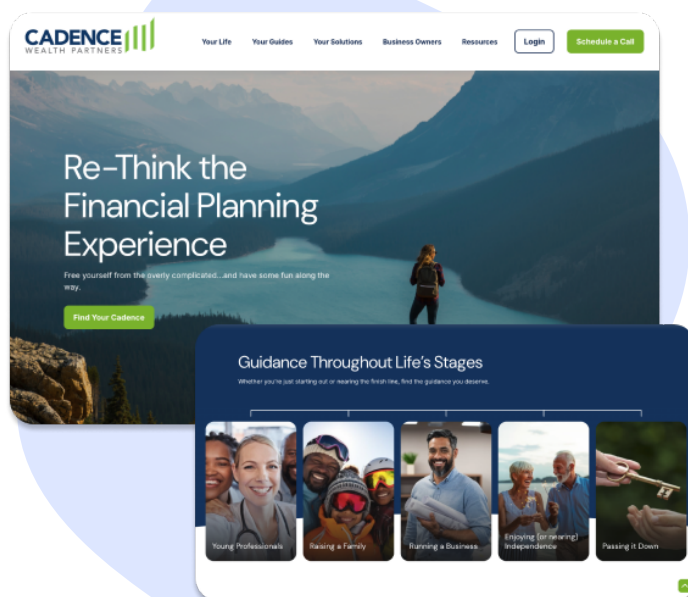
- Developed a website that showcases the firm's personality
- Integrated humor, expertise, and authenticity into every design element
- Used the “Building a StoryBrand” narrative framework to create compelling content

Strategic Content Design

- Crafted engaging, relatable content that addresses client pain points
- Used conversational language to build trust and familiarity
- Positioned the firm as a knowledgeable guide, not just a service provider

Consistent Visual Branding

- Maintained uniform color schemes and typography
- Reinforced brand recognition across all digital touchpoints
- Created a cohesive and professional online presence



Business Impact

By reimagining their website as a storytelling platform, Cadence Wealth Partners:



Differentiated themselves in a crowded market



Established a stronger emotional connection with potential clients



Transformed their digital presence from functional to inspiring

A website is more than a digital brochure—it's a powerful tool for expressing brand identity and building client relationships.



Website Checklist

Here is a roundup of our best practices to check your own website. Keep it handy all year long to ensure you're on track and getting the most out of your digital presence.

- ☐ Write your headline in problem-solution format
- ☐ Write an engaging and personality-driven About Us page
- ☐ Plan your content and navigation around what visitors want (Use no more than 6 navigation buttons)
- ☐ Make your copy and site scannable
- ☐ Include at least 2 Calls-To-Action on the Home page
- ☐ Include a calendar link so visitors can easily schedule a meeting with you (versus only a Contact Us link)
- ☐ Introduce yourself with a video
- ☐ Include unique conversation starters on your website (e.g., office dog)
- ☐ Publish new content on your website regularly
- ☐ Up your social currency – include Awards, “As Seen In” and Testimonials on your site
- ☐ Include an FAQ page on your website

Elevate your online presence with FMG's Premium Website Design

Transform your digital brand with a completely custom website that uniquely reflects your practice, crafted through a personalized collaboration with our expert design team

[Learn More >](#)

Additional Resources

Website Inspiration:

[Website Gallery](#)

[Crafting Authentic Messaging Example](#)

[Website Makeover Workshop](#)

Additional Tips:

[Homepage Design Tips](#)

[Powerful Call-to-Action Techniques](#)

[Financial Copywriting Secrets](#)



Samantha's Quick Tip:

How to actually [capture leads from your website](#).



I get endless compliments on the site, it's easy for prospects to book meetings, and the Peltoma story is beautifully narrated and visualized. And we went from start to finish in about 3 days

Rubin Miller
Peltoma Capital Advisors



We've had an increase in new clients since we launched our site and many tell us that it played a key role in their decision to meet with us. We're also attracting a lot more millennials. We couldn't be more pleased!

Michael Murray
Peabody Wealth Advisors

Social Media

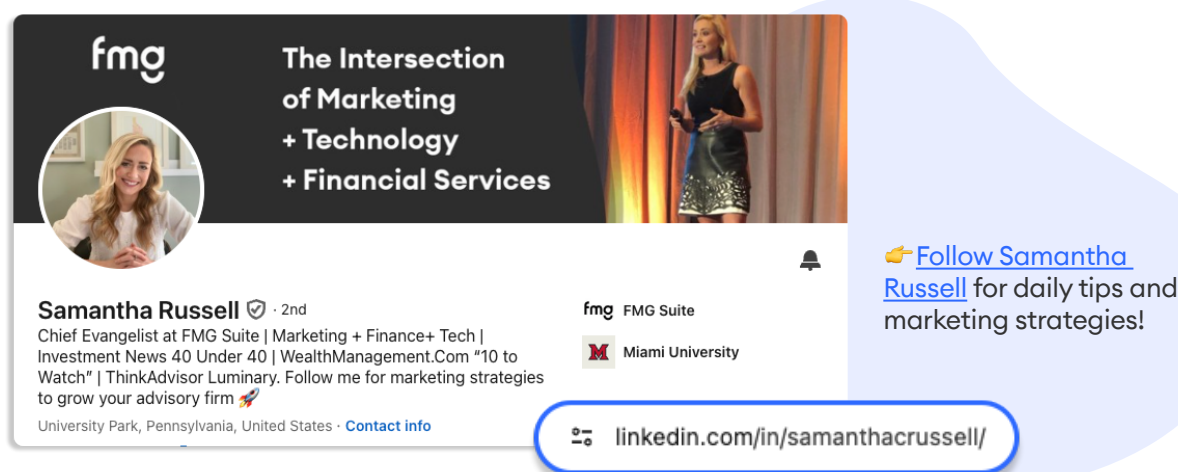
Optimize your LinkedIn presence to **effectively engage a network of prospects**



LinkedIn is a **Dynamic Platform** for Building Meaningful Professional Relationships

1. Nail Your Profile

When potential clients search for you online, your LinkedIn profile is often their first impression. Optimize every element to showcase your professional brand and expertise (see checklist, page 11).



2. Post Zero-Click Content

Create content that provides immediate value without requiring users to click away. Share insights directly in your post, using carousel formats, lengthy text with emojis, and/or embed video to keep your audience engaged and informed.

3. Understand the Algorithm

Decode LinkedIn's content distribution mechanics to increase your content reach. It prioritizes:

- Content from users you've engaged with previously
- Posts from creators who consistently generate high engagement
- Native content that keeps users on the platform (text posts, images with text, videos)
- Quality comments over high-volume reactions
- Carousel and video formats that provide comprehensive information
- Posting during peak engagement times for your network



79%

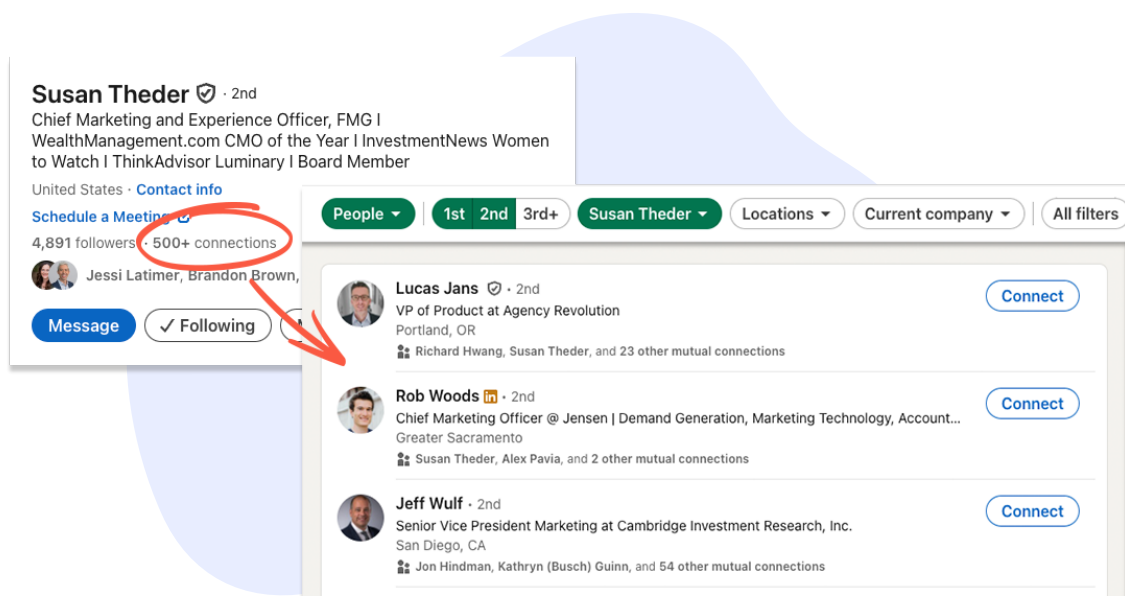
of Americans representing the millennial or Gen Z age groups have gotten financial advice from social media*

*[Forbes](#)

4. Find Meaningful Connections

Move beyond passive networking:

- Use advanced filters to identify 2nd-degree connections that fit your goals or interests (ex. filter by Company, Location, Alma Mater, or Industry).
- Personalize every connection request with a thoughtful message
- Consider connecting with potential clients, centers of influence (COI), local charities or groups and professionals in complementary fields
- Engage with their content before and after connecting to build that online relationship



5. Follow the 80/20 Rule

Engage with 4 posts for every 1 you share

- Craft thoughtful, substantive comments that add value
- Ask open-ended questions that invite discussion
- Respond to every comment on your posts
- Share insights, ask for perspectives, and create a two-way conversation



View more **LinkedIn tips**
here to get started



LinkedIn Checklist

Here is a roundup of our best practices to optimize your LinkedIn. Keep it handy to ensure you're building a strategic, engaging professional presence that attracts opportunities.

Profile Optimization:

Visuals

- ☐ Professional, high-quality headshot (clear, recent, business-appropriate)
- ☐ Strategic banner image that reflects your professional brand
- ☐ Personalized your LinkedIn URL

Profile Narrative

- ☐ Craft a compelling, unique headline that speaks to your value proposition
- ☐ Transform [summary](#) into a storytelling narrative
- ☐ Add clear, specific call-to-action
- ☐ Highlight designations, awards, and achievements
- ☐ Feature testimonials
- ☐ Verify your account for added credibility

Content Strategy:

Content

- ☐ Post Zero-Click Content and mix up the type of content:
 - Personal insights
 - Industry tips
 - Professional achievements
 - Data charts and graphs
 - Educational videos
 - Client success stories

Engagement Approach

- ☐ Follow 80/20 Rule:
 - Comment/engage with 4 posts for every 1 you create
 - Prioritize meaningful, value-adding comments



Advanced Tactics:

Leverage LinkedIn Features

- Use LinkedIn Events for:
 - Webinars, Client events, Educational seminars
- Implement Sales Navigator for:
 - Advanced prospect searching and tailored outreach strategies

Continuous Improvement

- Monthly analytics review:
Track post performance, and trends in follower growth or interactions

Time-Saving Resources:

Content Generation Tools

- Third-party tools:
 - [Veed.io](#): Free AI video editor to add text to video, subtitles, and more
 - [Authored Up](#): Tool to create and analyze LinkedIn content to optimize profile performance
 - [Kleo](#): A free browser extension to help consume and create content on LinkedIn

FMG Mobile App is a free AI-driven tool to generate and share content with a simple click of a button.

[Learn More >](#)



Daily & Weekly Habits:

☀ Daily | 15 minutes

- Engage network by:
 - Engaging with relevant or thought provoking content
 - Leaving thoughtful comments
 - Sharing relevant content
- Interact with first AND second-degree connections

Weekly | 5 minutes

- Send connection requests to:
 - Anybody you recently emailed or met with this past week
 - Any networking event connections
- Personalize every connection request with a message!

Additional Resources

LinkedIn Trainings:

[Samantha Russell Shares How She Grew to 40K Followers](#)

[Advanced Strategies + Live Profile Reviews](#)

[Social Media Mistakes + How to Fix Them](#)

General Social Media Strategies:

[8 Social Media Post Ideas](#)

[Social Media Lead Generation](#)

[Make Your Brand Stand Out on Social Media](#)

Expand Your Social Media Reach:

[Instagram](#)

[Facebook](#)

[YouTube](#)



Samantha's Quick Tip:

[Prime the LinkedIn algorithm](#) in 10 minutes before your posts go live to boost engagement.

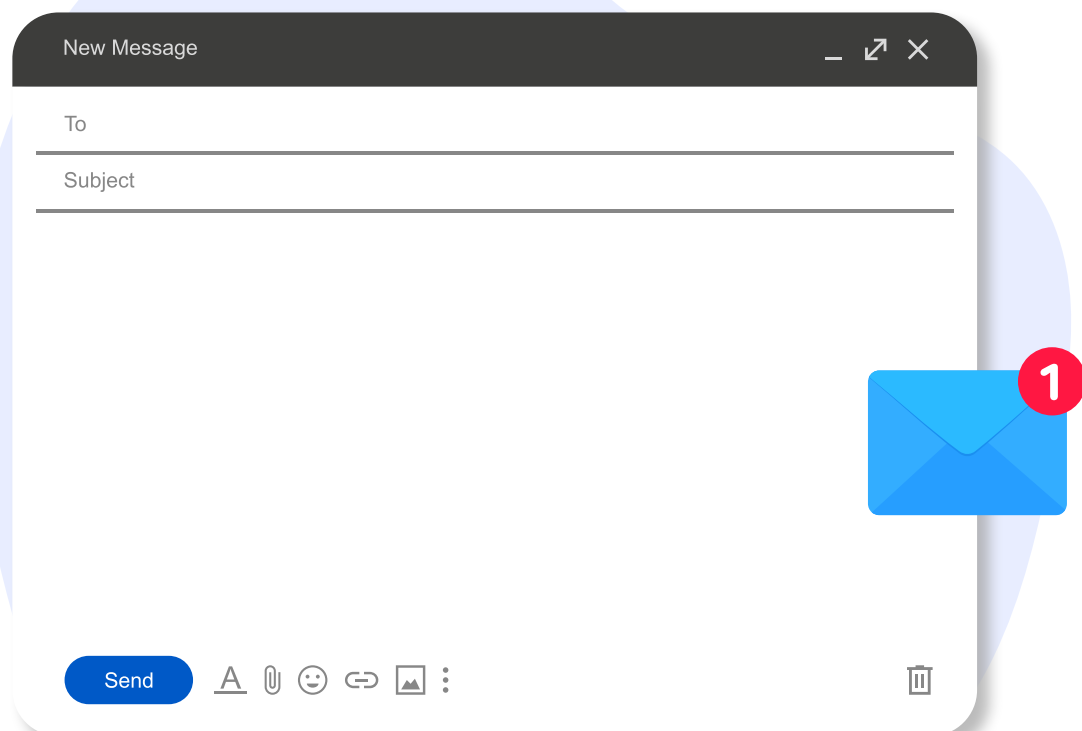


Because of our partnership with FMG's Do It For Me (DIFM) program, the engagement with our content has just about doubled! It seems like weekly we get compliments from clients or prospects about the FMG content the team distributes on our behalf. We've saved time and money, and the results are great! I would highly recommend it

Doug Howes
Sapphire Wealth Management

Client and Prospect Communications

Strategically mix email and texting to **reach your clients and prospects**



Craft a Communication Strategy that Engages and Converts

Email is King

Email remains the most vital channel for client outreach.

Consider sending:

- **Email Newsletter:** weekly or monthly updates on firm and industry news
- **Automated Drip Series:** from prospecting to new client onboarding, drip emails are important for ongoing education and engagement
- **Timely Content:** provide context during market volatility or breaking news, offering reassuring strategic communication and reminding clients to stay focused on long-term goals
- **Personalized Lifestyle Content:** track client hobbies in CRM to send relevant, engaging personal content (think: wine, cooking, golf, pickleball, etc.)
- **Birthdays and Anniversaries:** don't forget about celebratory wishes and significant milestones

75%

of clients left or considered leaving their advisor in 2023 due to infrequent communications*



Texting: Your Communication Accelerator

Email and texting combined can increase customer engagement by 10X**

Use texting for:

- **Rapid Document Completion:**
 - Text reminders get documents returned in 5 minutes ([MyRepChat](#) Internal Data, 2024)
 - Follow up on pending paperwork quickly
- **Appointment Management:**
 - Confirm meetings
 - Reduce no-shows
 - Provide easy rescheduling options
- **Instant Communication:**
 - Time-sensitive updates
 - Quick check-ins
 - Annual review scheduling
- **Compliance-Friendly:**
 - Adhere to financial industry regulations
 - Maintain professional communication standards

View even more ways
texting can help you
become more efficient

*[YCharts](#)

**[Mail Munch](#)



Communication Strategy Checklist

Create consistent email and text communications to stay top-of-mind with your clients and prospects.


Define Your Communication Channels

- ☐ Email:
 - Ideal for newsletters and comprehensive information
 - Perfect for personalized messages like birthday and anniversary celebrations
- ☐ Texting:
 - Best for quick, personalized messages
 - Great for appointment confirmations and document follow-ups

Segment Your Audience

- ☐ Minimum segments: Clients and Prospects
- ☐ Advanced segmentation by:
 - Investing stage
 - Retirement proximity
 - Lifestyle interests
 - Specific financial goals
 - Hobbies or demographic characteristics

Email Best Practices

- ☐ Craft Compelling Subject Lines
 - Use attention-grabbing, value-driven language
-  Leverage free AI tools or subjectline.com for optimization
- ☐ Personalization Techniques
 - Address recipients by name
 - Tailor content to specific segment needs
 - Add a personal touch!

Streamline your client communications with **pre-written content and automated sequences**. Our “Do It For Me” program handles the heavy lifting and personal touch, so you can focus on what matters most.

[Learn More >](#)

Content Creation

- Simplicity is Key
 - Write at a 7th-9th grade reading level
 - Use the [Flesch Kincaid score](#) to test readability
 - Minimize industry jargon
 - Create easily scannable content
- Clear Call-to-Action
 - Define a single, prominent action for recipients
 - Make the next step obvious and straightforward



Technical Optimization

- Mobile-Friendly Design
 - Ensure responsive email and text templates
 - Test on multiple devices
 - Use legible fonts and appropriate sizing
- Performance Tracking
 - Monitor key metrics:
 - Open rates
 - Click-through rates
 - Conversion rates
 - Regularly adjust strategy based on performance data

Communication Frequency

- Establish a consistent but not overwhelming schedule
We recommend:
 - 2 blogs/month
 - 4 emails/month
 - 18 Social posts/month:
 - 9 on Observances and Lifestyle Topics
 - 9 on Financial Topics
- Avoid sending multiple communications on the same day
- Respect audience communication preferences



Ask clients in a meeting their communication frequency and method and make a note in CRM

Additional Resources

Workshop:

[Build a Content Calendar in 45 Minutes](#)

Texting Tips:

[Connection Strategies Through Texting](#)

[Explore MyRepChat: Your Compliant Texting Solution](#)

Email Insights:

[5 Proven Email Subject Lines](#)

[8 Email Personalization Best Practices](#)

[The Optimal Email Frequency](#)



Samantha's Quick Tip:

[Get more email opens](#) with personalized content and eye-catching subject lines.



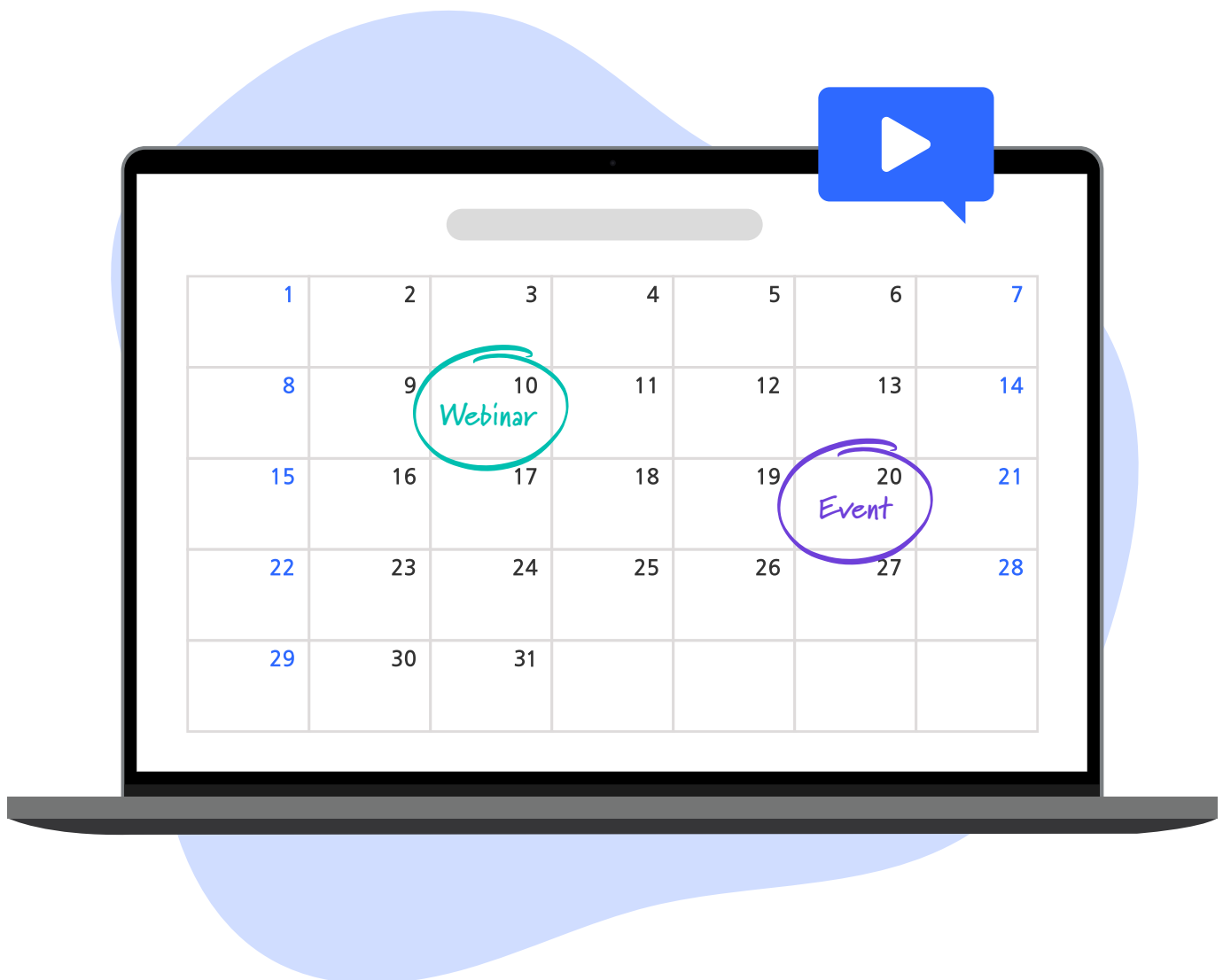
I get thank you calls on the birthday cards sent automatically through my FMG Persona. I've had clients reach out with questions and send notes of appreciation from the monthly newsletters. I don't have time to do the personalized outreach I need to be doing. FMG's marketing team makes me look great!

Mo Rowe
First Financial Group

SECTION 4

Events

Generate quality leads and referrals, and show client appreciation, **by hosting engaging events – online or in-person**



An Opportunity to Stand Out – Tap into Events

Differentiation is Key

- Events are not just about information; they're about **creating memorable experiences**
- Focus on unique, value-added content that **solves real problems** for your clients and prospects

Event Frequency and Planning

We recommend mixing virtual and in-person events and hosting (at a minimum):

- Initial Stage: start with 2 events per year
- Growth Stage: aim for quarterly events (4 per year)
- Advanced Stage: be flexible to add timely events on trending topics to your event schedule

Virtual Webinars: Maximizing Engagement and Lead Generation

Utilize an educational, online seminar format to:

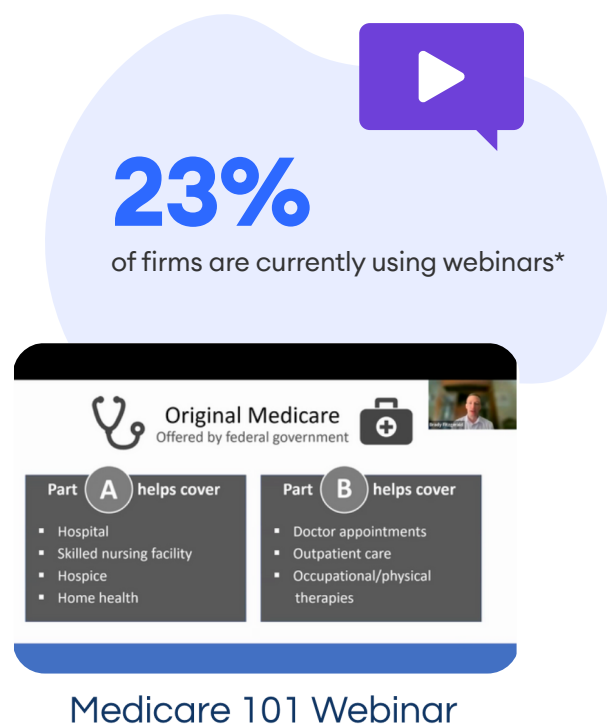
- Generate high-quality leads
- Provide scalable content with high ROI
- Build brand awareness and establish authority
- Offer accessibility and convenience



Webinar Tips

- Partner with Subject Matter Experts (SMEs) for a joint presentation
- Collaborate with Centers of Influence (COIs) to expand reach, add credibility and cross-promote
- Add fun giveaways or prizes during the live event to encourage attendance and participation
- Re-purpose the content and cut video snippets to use all year long on social media

*[WealthManagement.com](https://www.WealthManagement.com)



In-Person Events: Building Meaningful Connections

Networking in person is a powerful way to:

- Create memorable experiences attendees will want to share
- Engage with clients and prospects on a personal level
- Demonstrate expertise through direct interaction
- Encourage networking and referrals
- Deepen client relationships across generations – don't forget to invite clients' children!



16%

of advisors focus on hosting in-person events*



Valentine's Day Luncheon

To kick off our 2024 events, Cox Financial Group held a luncheon on Valentine's Day for our "Single and Single Again" ladies. We fellowshiped over brunch at Sunny Street Cafe in Willow Park and played some "love themed" Trivia!

See an example [timeline of events](#) >

*[SmartAsset](#)

Advisor Examples



John M. Morgan • 1st

Fractional Business Development - Key Initiator and Relations...

1mo ...

Very cool 🤓 idea, [Samantha Russell](#)! I still miss the annual client BBQ's that we put on at a local Park each year in December. Great food 🍔, live music 🎵, games 🎮 and prizes 🏆 made for a very memorable event for our clients, their families and yes, Us too!



Curtis Dunn • 1st

Regional Vice President, Sales - Atlantic

1mo ...

It's almost the season...Rent a Santa for a few hours, put up a winter backdrop, and offer your families to skip the mall and join you for their children's Christmas photos!

Seasonal Event Inspiration

☀️ Summer

- Yappy Hour Event
 - Pet-friendly gathering with drinks and social activities
 - Showcases your approachable, community-focused brand
 - Allows clients to bring the entire family (including furry members!)

❄️ Winter

- Winter Wellness Seminar
 - Partner with local health professional
 - Financial and personal wellness focus – perfect for the busy holiday season and New Year
 - Provide complimentary chair massage

🍁 Fall

- [Family Photo Experience](#)
 - Book a local photographer
 - Provide complimentary mini shoots for the whole family
 - Don't forget (non-messy) snacks, especially for the kids!

🌱 Spring

- Financial Literacy Family Day (aligned with Financial Literacy Month in April)
 - Educational workshops for different age groups
 - Kids' financial games and activities
 - Send home a book or keepsake



Get more **event ideas** here!



Event Checklist

Follow these steps to ensure you're creating memorable, strategic experiences that drive business growth and client engagement.

Pre-Event Planning

- ☐ Define clear event objectives (lead gen, education, client appreciation, engagement)
- ☐ Choose your event type: virtual or in-person
- ☐ Identify target audience and relevant topic
- ☐ Choose date/time, select location, set budget and define goals

Event Design

- ☐ Develop agenda and presentation materials
- ☐ Identify potential speakers/strategic partners:
 - Collaborate with complementary businesses
 - Virtual: Local estate planning attorneys, real estate agents, tax professionals
 - In-Person: Local wineries, yoga studios, wellness centers

Marketing and Promotion

- ☐ Design event branding
- ☐ Create a registration landing page
- ☐ Develop email marketing campaign
 - Initial invite (2-3 weeks prior)
 - Reminder emails (1 week, 1 day, day of event)
- ☐ Post on social media + create a LinkedIn Event listing
- ☐ Reach out to potential partners/influencers
- ☐ Send personal invitations to high-value prospects



To build excitement, use language such as: *“Several attendees have asked about bringing guests. RSVP now to secure your spot and guest invitation.”*

FMG's Event Tool has your event covered from start to finish. From turn-key seminar content to automatic promotional communications and registration tracking.

[Learn More >](#)

Logistical Preparation

- Virtual:
 - Test webinar platform, audio and video equipment
- In-Person:
 - Venue confirmation and technical set up
 - Registration process
 - Digital or physical sign-in
 - Don't forget name tags!



Event Execution

- Arrive early!
- Always engage audience through:
 - Virtual: Q&A interactions and chat
 - In-Person: use first name and facilitate networking
- Capture photos/testimonials

Post-Event Follow-Up

- Send personalized thank-you emails
 - Virtual: send replay with summary
 - In-Person: share event photos
- Offer a follow up meeting
- Conduct feedback survey
- Nurture leads with relevant content

Performance Evaluation

- Analyze attendance and engagement metrics and feedback
- Identify improvement opportunities for future events!

Don't forget to Repurpose Your Event

- Transcribe a virtual webinar
 - Create short clips for YouTube and social media (+ video transcript for SEO)
 - Develop related blog post
 - Update landing page with replay
- Post in-person event pictures
 - On your website
 - On social media

Additional Resources

Pro Tips:

[Event Marketing Essentials with FMG](#)

[5 Pro Tips for Webinar Success](#)

[Organic Growth Workshop](#)

Inspiration:

[Memorable Client Events](#)



Samantha's **Quick Tip:**

[Make your event a success](#)



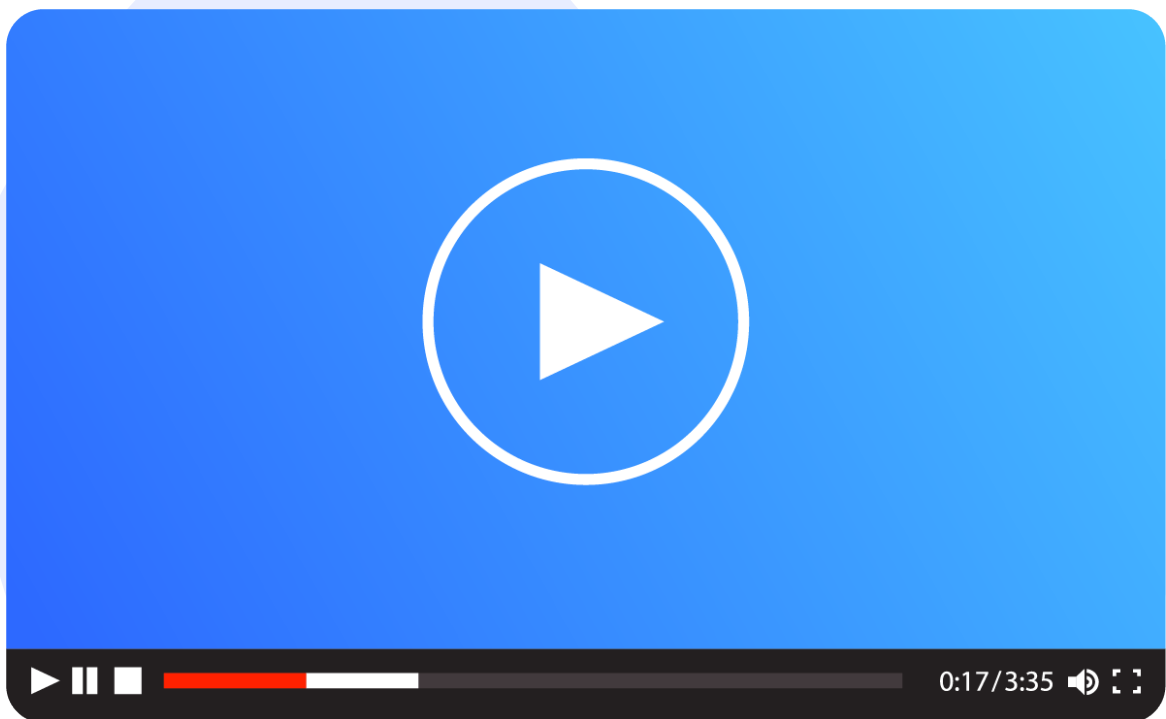
FMG's Event Tool has been a game-changer for promoting our client events. We love that it's so easy to use and creates a landing page to capture RSVPs all within the FMG platform. We are getting fantastic response rates; it saved us time with compliance, and having everything tied in with our website makes our promotions work even better!

Kevin Blondina
B & D Group

SECTION 5

Video

Use videos to **engage with your audience personally and build trust**



Amplify Your Marketing Efforts with Compelling Video

Enhance regular email communications

Incorporating video leads to a **300% increase in email click-through rates**.*

- Add a personal message
- Use video content, such as FMG's Monthly Marketing Insights or Video of the Month to share expertise
- Add a video synopsis with your commentary of the content

79%

of consumers would rather watch a video about a product than read about it*

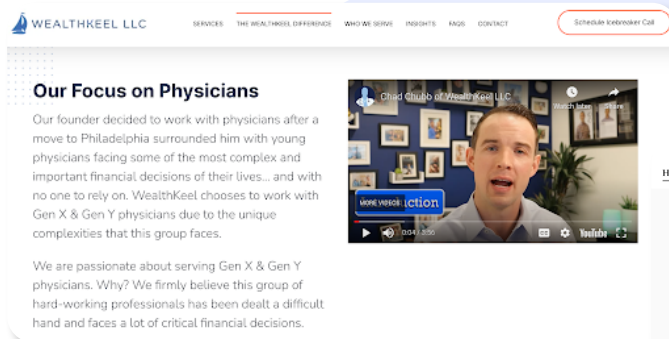
Increase social media engagement by 400%**

- Give quick tips on a financial topic
- Add timely market insights
- Don't forget to weave in personal videos - events, travel updates and showoff family/pets (these often get the highest engagement)

Bring life to your website

Incorporating video on landing pages results in an **80% rise in conversion rates**.*

- Add a firm introduction on your homepage
- Develop individual "Meet the Team" videos on "About Us" page
- Implement a video blog (Vlog) section with insights and financial planning tips



[Introduction to Firm](#)



[Video Blog \(Vlog\)](#)

*Animoto

**Insivia

Essential Video Content to Record

At minimum we recommend these three videos

Founder's Story: personal journey and professional motivation

- Builds emotional connection with potential clients
- Demonstrates authenticity
- Helps prospects understand your unique value proposition



Speak genuinely and from the heart. Don't overproduce—authenticity resonates more than perfection



Client Experience Walkthrough: demystify your process

- Explain what prospects can expect
- Focus on client needs, not just services
- Create a post-discovery meeting touchpoint



Use “You” language to directly address prospect concerns and goals.

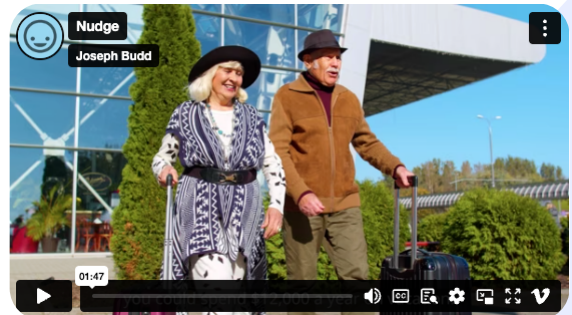


Nurture/Reminder Video: stay top of mind

- Incorporate humor or unexpected approaches
- Keep tone light and approachable
- Subtly remind prospects of your available



Experiment with different styles to find what feels most authentic to you.



95%

Users will retain 95% of a message watched on video as **opposed to only 10% read in text***

*[Insivia](#)



Video Marketing Checklist

Keep this checklist handy to ensure you're creating high-quality, impactful videos that showcase your expertise and connect with your audience.

Camera

- ☐ Smartphone or Webcam
 - Optional: tripod for stable recording

Location

- ☐ Quiet, minimal background distractions, natural light source (near a window)
- ☐ Professional, clean background (but don't skimp on any personal touches - people love seeing art pieces, autographed jerseys or family photos in the background)

Content

- ☐ Script development
- ☐ Identify any graphics / pop-ups to include

Recording Best Practices

- ☐ Business casual attire (or what you'd wear in a client meeting)
- ☐ Speak conversationally
- ☐ Use storytelling techniques (pretend you're talking to a friend)
- ☐ PRACTICE and re-record as many times as you'd like (nobody needs to know how many takes it took!)

Editing

- ☐ [Tools](#) like Veed make it really easy to edit
- ☐ Quick edits to
 - Remove dead space at beginning/end
 - Check audio levels
 - Add subtitles
 - Add any visual elements

Post-Production

- ☐ Don't forget to submit to compliance and obtain necessary approvals
- ☐ Create [video thumbnail](#) and write a 1-2 sentence description
- ☐ Distribute:
 - YouTube
 - Email newsletter
 - Website
 - Social media

FMG's Video Email Widget allows you to upload a video straight to an email, no need to host it elsewhere, create a thumbnail or any extra steps!

[Learn More >](#)

Additional Resources

Video Trainings:

[Video 101: The Proven, Step-by-Step Playbook](#)
[The Power of Video Marketing](#)

Video Strategy Deep Dives:

[Using Video for Lead Generation](#)
[4 Video Marketing Ideas](#)

Have you Considered Podcasting?

[5 Steps to Getting Started](#)
[Podcasting Success Checklist](#)



Samantha's **Quick Tip:**

[Start your video with a hook](#)



Somebody came back to me and said 'you know your high school looks just like my high school!' and another said 'I had this happen in my family when I was growing up and I understand what you're talking about'...There's an emotional connection that you make with folks that watch this [personal story video]. It's an interesting way to have a personal connection with others

Joe Budd
Budd Wealth Management



Marketing Simplified: Your Path to Growth

This guide isn't just a collection of tactics—it's your comprehensive blueprint for sustainable growth in 2025 and beyond.

We covered:

- **Digital Presence:** From websites that convert to LinkedIn strategies that build authority
- **Communication Mastery:** Personalized outreach that keeps you top-of-mind
- **Engagement Strategies:** Events and video content that create meaningful connections

Free Consultation Offer:

Schedule a 20-minute consultation with our marketing experts. We'll dive into your specific goals and show you exactly how we can help you achieve them—with as much or little effort on your part.

[Schedule Now](#)

