

Getting every advisor on camera *without losing control* of what they say.

The case for putting your whole bench on camera, not just the few who enjoy it, and what a firm has to build to make that safe.

WRITTEN FOR

Marketing and compliance leaders at wealth management firms, and the executives who sign off on both.

Every figure in this paper is cited with its source, sample and method.

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The argument *in five points*

If you read one page, read this one.

1

The trust is already yours. Human advisors remain the single most trusted source of investment guidance, according to CFA Institute's 2026 survey of more than 2,400 investors. But younger investors are learning online, and about one in three have already used generative AI for financial education. The most trusted voice is missing from the channel.

2

Video's real advantage is believability. In a randomized study of 7,609 US adults, video was significantly more believable than the same message as text, while its edge in changing attitudes was much smaller. Believability is what an advisory relationship runs on.

3

The unit is the advisor, not the firm. Trust attaches to the person a client knows. A program that covers leadership and a few volunteers reaches the wrong relationships.

4

Programs stall on process, not people. Late review, nothing reusable, a fragmented brand and a thin record stop firms long before camera nerves do. Production got cheap. Review did not.

5

Six controls make it safe to scale. Lock the script first, let the system add disclosures and branding, approve before anything publishes, keep the record, and administer access. Then prove it with five advisors in thirty days, and measure the time from recording to approval.

01

The trust is *in the wrong place*

Two findings from the same study, read together, make the whole argument.

In March 2026, CFA Institute published a survey of more than 2,400 mass-affluent, high-net-worth and very-high-net-worth investors across six wealth markets. Two of its findings sit oddly next to each other.

The first: human advisors remain the single most trusted source of investment guidance.

The second: Gen Z and millennial investors are learning from social platforms, influencers, apps and AI tools. About one in three have already used generative AI for financial education. The advisor's role, as the report puts it, is shifting from gatekeeper of information to **curator, validator and translator**.

CREDENTIALING BODY

Next-Gen Investors: A Guide for Wealth Managers & Financial Advisers

CFA Institute Research & Policy Center · Published 23 March 2026 · 2,400+ investors across Canada, India, Singapore, the UAE, the UK and the US

#1

Human advisors are the single most trusted source of investment guidance

~70%

of Gen Z and millennial investors who engage a paid financial professional interact with that advisor at least monthly, and expect to be reached through the tools they use everywhere else

1 in 3

Gen Z and millennial investors have already used generative AI for financial education

Put those next to each other and the problem states itself. **The trust already belongs to your advisors. It simply is not present where the learning is happening.**

That is not a content problem, and it is not a brand problem. It is a distribution problem with a specific shape: the trusted party is absent from the channel.

Nor will time solve it on its own. These are not disengaged clients. Seven in ten of the younger investors who work with a paid advisor already talk to that advisor monthly. The relationship is active. The *presence* is missing.

02

What video *actually* does

This category oversells the answer, so it is worth being exact about what video buys a firm.

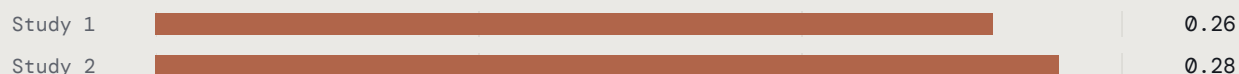
The best evidence is a pair of randomized experiments with **7,609 US adults**, published in *PNAS* in 2021: 26,584 observations across 72 message clips, each tested against a verbatim transcript and against a no-message control.

Video was significantly more **believable** than the identical message delivered as text. Its advantage in **persuasion**, actually shifting attitudes, was roughly a third the size. In the authors' words, the difference between video and text was "comparable to, if not smaller than" the difference between text and no message at all.

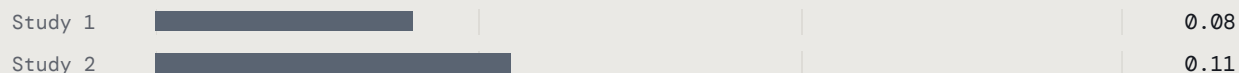
Where video's advantage actually sits

Effect of video over a verbatim transcript, in standard deviations. Both studies, all three outcomes measured.

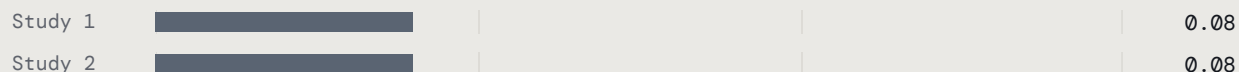
BELIEVABILITY



PERSUASION (ATTITUDES)



SHARING INTENTIONS



0 0.10 0.20 0.30 SD

Study 1 tested 48 professionally produced political ads; Study 2 tested 24 widely viewed COVID-19 clips. Source: Wittenberg, Tappin, Berinsky and Rand, *PNAS*, 2021.

That is a narrower claim than the category usually makes, and a more useful one. Nobody needs persuading that they should have a retirement plan. A prospective client is deciding whether they believe *this particular person* with *this particular money*. That is a credibility judgment, not an attitude change.

Believability is the mechanism the research supports, and it is exactly the mechanism an advisory relationship runs on. Video is the right instrument for moving trust into a channel. It is the wrong one if you expected it to change minds.

03

Why it has to be *the whole bench*

This is where most firms get the shape of the thing wrong, and it is not a question of ambition or budget.

Trust of the kind the CFA data describes is **personal**. It attaches to a named person a client has met, whose judgment they have tested and whose voice they recognize. It does not attach to a firm.

That has an uncomfortable implication for the way most firms produce content. Material made centrally and published under the firm's name carries the firm's credibility, which is real, and which is not the asset in question. The trust the research identifies belongs to the advisor, and it travels only when the advisor is visibly the one speaking.

THE CONSEQUENCE

A video program that covers the executive team is not a small version of a video program. *It is a different thing.* It reaches the relationships the firm holds institutionally and leaves untouched the ones that actually carry the trust.

The unit of the program is the advisor, not the firm. So the only version that does what the research says is one **every advisor can actually run**, including the ones who are busy, skeptical and would never describe themselves as good on camera.

That constraint is what makes this hard. It is also why so many programs stall with a handful of volunteers.

04

Why programs *stall*

Firms that have tried this usually recognize some version of the following. None of it is about an advisor being camera-shy.

FAILURE 01

The queue, not the camera

A video that takes weeks to clear review is a video the advisor stops making. Compliance is rarely the obstruction. The obstruction is that **review happens at the end, on a finished file**, where the only remedies are approve, reject or re-record.

FAILURE 02

Nothing is reusable

Each advisor solves the problem privately: a phone in the car, a video call recording, a relative with editing software. Nothing that results can be reviewed consistently, branded consistently or reused.

FAILURE 03

The brand fragments

Twenty advisors producing video on their own means twenty visual identities, twenty disclosure habits and twenty levels of quality, all attached to **one firm name**.

FAILURE 04

The record is thin

A firm should be able to say what a given advisor said on camera, when, whether it was reviewed and by whom. If the answer means finding and watching the original file, the record is not doing its job.

Notice what those have in common. Every one is a firm-level problem (a process, a system, a record), and not one is solved by persuading an individual advisor to try harder.

A few years ago the binding constraint was different. It was production cost: studio days, a videographer, an editor on a two-day turnaround. That constraint has largely collapsed. Teleprompting, filler-word removal, captioning, framing and multi-format export are software now.

What did not get cheaper is review. A firm can now produce far more video than it could a few years ago, with the same review capacity it had then. That is the constraint worth designing around.

05

What makes it work *at scale*

Six controls. Not a feature list, but what has to be true before a firm can let forty people speak on camera under its name.

CONTROL 01

The script is fixed before anything is recorded

Review moves to the front, and the script is **locked** before the camera opens. Locking creates the reference point: what was approved and what was said are the same artifact.

CONTROL 02

Disclosures are added by the system

Required language and end slates are applied automatically, instead of depending on an advisor to remember them on take four.

CONTROL 03

Branding is set once, at the firm

Colors, fonts, frames and captions are configured centrally and inherited by every advisor. Nobody can produce something off-brand, **because the option is not there**.

CONTROL 04

Nothing publishes before someone approves it

Review sits between finishing and distribution, not after it, and a person takes the final publishing step deliberately.

CONTROL 05

There is an audit trail

Script, lock, approver and output are retained and retrievable. **Video should sit inside the advertising and communications policies you already have**, not beside them.

CONTROL 06

Access is administered

Who can record, who can approve and who can publish are firm settings, not individual habits.

WHERE THE AUDIT TRAIL HAS TO LAND

Video sits inside rules you already have: the **SEC Marketing Rule** (17 CFR 275.206(4)-1) and the **Advisers Act books-and-records rule** (Rule 204-2, advertisements kept for **five years**), plus **FINRA Rule 2210** where a broker-dealer is involved (**three years**, via Exchange Act Rule 17a-4(b)).

Note the mismatch: a firm spanning an RIA and a broker-dealer runs two retention clocks over the same video file. Confirm with counsel how any platform's retention meets your archiving obligations.

THE POINT OF ALL SIX TOGETHER

It is not to constrain the advisor. It is that *an advisor who cannot go wrong needs little supervision*, which is what lets a program scale past its first few volunteers.

06

How to *start*

Prove it on five people in thirty days. Not the five most enthusiastic. The point is to test the constraint, not to collect content.

Pick a spread, not a fan club: one advisor who already makes video, two who are willing, **one who is genuinely reluctant**, and someone from compliance who runs a review end to end. One video each, one review cycle each, thirty days.

SEAT 1 Already makes video Shows what the workflow does for someone who needs no convincing.	SEAT 2 Willing The typical advisor. Their experience sets the baseline.	SEAT 3 Willing A second typical case, so one person's habits don't decide the result.	SEAT 4 Genuinely reluctant The most informative seat, and the one most firms leave out. If it works here, it works for the bench.	SEAT 5 Compliance reviewer Runs one review end to end and times the queue.
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FOUR THINGS WORTH MEASURING

Time from recording to approval The single number that best predicts whether the program survives contact with the bench.	TARGET Days, not weeks
Who publishes a second video unprompted Repeat behavior is the adoption signal. First videos are enthusiasm.	TARGET A majority, unreminded
Review cycles per video Above one, and the script-locking step is not doing its job. The fix is upstream, not in review.	TARGET 1.0
Assets produced per recording session The efficiency argument, in a number your own firm generated rather than one a vendor supplied.	TARGET Count, don't estimate

NOTE WHAT IS NOT ON THE LIST

View counts. Views depend on each advisor's existing audience, which the firm does not control in month one. In a thirty-day pilot they measure an advisor's following, not the program.

How Cue Studio runs *the six controls*

We build Cue Studio for exactly this problem. Here is how each control shows up in the product.

CONTROL 01 Script fixed first	Scripts come from the firm's approved library, the advisor's own words, an uploaded document or a Cue draft, and every one is locked before recording.
CONTROL 02 Disclosures by the system	A firm-approved disclosure slide is added to every video automatically.
CONTROL 03 Branding set once	Brand and disclosures are set centrally and inherited, so every render carries the advisor's name, title and brand color with burned-in captions.
CONTROL 04 Approval before publishing	Review sits before delivery, and Cue never posts on an advisor's behalf.
CONTROL 05 An audit trail	Compliance can review the exact file that was rendered, tied to the script that was locked.
CONTROL 06 Administered access	Firms publish scripts to the advisors they choose, and can revise or withdraw them at any time.

Around those controls, a camera check coaches framing, lighting and audio before each take, and a paced teleprompter keeps the advisor on the locked script. Editing works through the transcript. Every session delivers 16:9, 4:5 and 9:16 versions from a single recording, with a transcript and a drafted LinkedIn post, and videos can run up to about 20 minutes. Recordings are never used to train AI models.

Advisors can also create an **AI avatar** from their own Cue recordings, after recording a short consent video, and use it to deliver new scripts through the same locked, disclosed and reviewable workflow. It is the advisor's own likeness, not a stranger reading their script. Section 02 is also why we suggest using an avatar to keep a steady rhythm, and recording yourself for the moments that matter most.

IF YOU WANT TO TEST THE CLAIM

Run the thirty-day pilot in section 06 against whichever platform you are already evaluating.

Five advisors, one video each, one review cycle. Time the queue. If a vendor will not agree to be measured that way, that is also an answer.

SOURCES

Sources *and notes*

Every figure in this paper comes from one of these. We would rather cite two strong studies than twenty weak ones.

PEER REVIEWED

Wittenberg, C., Tappin, B. M., Berinsky, A. J. and Rand, D. G. "The (minimal) persuasive advantage of political video over text." *PNAS* (2021) 118(47), e2114388118. Two randomized experiments, 7,609 US adults, 26,584 observations, 72 message clips.
pnas.org/doi/10.1073/pnas.2114388118

CREDENTIALING BODY

CFA Institute Research & Policy Center. *Next-Gen Investors: A Guide for Wealth Managers & Financial Advisers*. Munson, R. and Hayman, G. Published 23 March 2026. 2,400+ mass-affluent, HNW and VHNW investors across six markets.
rpc.cfainstitute.org/research/reports/2026/next-gen-investors

RULES CITED

SEC Rule 206(4)-1 (Investment adviser marketing); SEC Rule 204-2 (Books and records to be maintained by investment advisers); FINRA Rule 2210 (Communications with the Public); SEC Rule 17a-4 (Records to be preserved by certain exchange members, brokers and dealers).

This paper is for informational purposes and is not legal or compliance advice. Firms should evaluate any platform against their own written policies, their registration status and the requirements of their regulator. Rule citations are current as of September 2026 and should be confirmed with counsel before being relied on.

EVERY ADVISOR HAS SOMETHING TO SAY

See it on *your own script.*

Book a demo and we'll walk your team through Cue Studio, from an approved script to a finished, branded video, and help you set up the thirty-day pilot.

Book a demo

Or try it free for 14 days at cuestudio.ai