

## STATE OF DIGITAL

# FSOD

2024

**The largest and most comprehensive data analysis of financial marketing. Ever.**

Random results of strategy of a flywheel support flywheel problems pointme Convers on Ever of growi audienc turn me financi is consu Optimiz website involves words, if quality search more visibility and clicks: Research and choose relevant and specific long ment planning" "What is schedule?" Keep you including address, pl to date. Add photos to improve rankings. Advisors who add a "text me"-widget to their website see a 400% increase in new email opt-ins! Add a strong call-to-action above the fold (top half of page, visible without scrolling) where visibility is greatly increased. 2024 Marketing Prediction: "Smaller, thoughtfully curated in-person events and social invitations will replace larger, less personal client appreciation events." Ask (but in the right way) Using the script on the next page, offer clients the opportunity to help their loved ones. Hold client events and invite people to bring guests Publish engaging content that followers will want to share Form a referral network with attorneys, realtors, other professionals, and even advisors who work in different niches Most of all, create a valuable and positive experience that will make clients want to refer you to others "After using SnappyKraken for a year on my own, I decided to try Freedom360. Wow, what a difference! My clients interact more, and I've begun to receive far more inbound requests for prospect meetings. Highly recommended." Visually appealing. The human brain is able to process images approximately 60,000 times more

business. 2024 marketing prediction: As more advisors look to AI for help, we're likely to see a higher volume of marketing materials—blogs, graphics, even videos. That's going to make quality the big differentiator in 2024. Marketing that feels personal and human will stand out from the crowd." 34% of clients reported giving a referral due to their positive experience with their advisor." Immediately after a client thanks you for something you have done, you are presented with the perfect opportunity to remind them that they can tell others about you. Here's how some advisors are doing it with remarkable success. [Client expresses appreciation for something you have done] That's why I created Freedom360, a done-for-you marketing program built on the framework of the Financial Advisor Growth Flywheel. In Freedom360, you get a done-for-you growth flywheel so that you "win" at marketing without having to do it all on your own. This program is data-backed, and the results are proven. Increase engagement by presenting popular topics and trends in a highly visual and appealing way. Each newsletter is promoted across multiple channels including email, social media and land-

action. "Advisors who concentrate their effort on ONE single marketing activity that aligns with their natural and authentic style, caters to specific needs and pain points of ONE client and challenges them to step outside their comfort zone will have the most success in 2024." generation is a great way to grow your email and line up future client opportunities. The best converting lead generation campaigns include an "irresistible offer" along with with-term follow up and nurturing. Increase engagement by presenting popular topics and trends in a highly visual and appealing way. Each newsletter is promoted across multiple channels including email, social media and landing pages, offering an omni-channel user experience that keeps your prospects and clients "in the know". 2024 Marketing Prediction: "The shift towards human-first financial guidance will accelerate in 2024. Advisors will focus on connecting more truly with clients and prospects." Different types of content appeal to different audiences. Some prefer text-only content, whereas others more readily consume visual content. Know your audience and which resonates with them. Or, if you serve a variety of audiences with differing psychographic profiles, incorporate a variety of content types into your marketing strategy. Shorter, simpler texts outperformed longer, paragraph length messages. Placing numbers on your website, social media profiles, and landing pages drives inbound audience engagement. The final stage of the flywheel is what happens when your clients become lifelong fans - the refer you to their friends and family. While most advisors get occasional referrals, yours will get referrals and consistently only happens once you have a system in place. In this section, you'll find the learnings from conversations with thousands of advisors. Immediately after a client thanks you for something you have done, you are presented with the perfect opportunity to remind them that they can tell others about you. See a proven script for this on page 16. AI is getting more powerful by the day, but success depends on the user. Like any tool, the human touch is essential. Get ready for a year of proliferating content where it will be even harder to stand out unless you use tools like AI to help you amplify your messages in creative ways. 2024 Marketing Prediction: "AI tools will begin to make it easier for

more quickly than the same amount of text. Mobile optimized. 30% of all advisor web traffic is mobile. Don't ask for too much. Forms that only ask for a single email or cell phone number convert leads at a higher rate than those that ask for several pieces of information. Intentional design. Limit information and keep pages free of clutter so calls to action stand out. Though email is not new or flashy, it's still the top performing marketing channel overall. Email marketing provides a direct line of communication to your audience. If you aren't gathering email address from every new lead, prospect, and client, there's a good chance you are missing out on business. Invest time into writing and testing email subject lines. An email that doesn't get open, doesn't get read. High open rates are directly correlated to two three factors: 1) List quality, 2) Subject line quality, and 3) emailing an average of at least once per week. 2024 Marketing Prediction: "The key to success in 2024 for advisors is concentration. They won't be distracted by chasing algorithms or flashy tactics. Instead, they'll focus on mastering the fundamentals and staying patient." 2024 Marketing Prediction: "Advisors will realize that momentum marketing is the key to long-term success. It is about timing your marketing, not timing your marketing. Marketing Prediction: "I'm very bullish on social media for credibility, email, SMS & mail sequences to drive action: video & events to build value and automation & outsourcing to put it all together." We asked 22 industry experts to rank the importance of various marketing activities and channels for driving financial advisor growth in 2024. Their predictions were cited throughout this report. Some key themes are also highlighted on the following pages. Along with the data we gathered for this report, we spoke to nearly 200 advisors to find out services. They highlighted 7 key trends every advisor should know for 2024: video marketing grabs attention, tells a story in unique ways, and keeps prospects hooked. Original messaging and website copy has more impact than flashy content, but it's crucial to understand the fundamentals and stay focused on mastering the fundamentals and staying patient." 2024 Marketing Prediction: "The year we finally see a real take off in advisor marketing plans? I think so! Advisors who want to grow their influence and be relevant have to be where the people are, and that means prioritizing entertaining (not just educational) video content." Visually appealing. The human brain is able to process images approximately 60,000 times more quickly than the same amount of text. Mobile optimized. 30% of all advisor web traffic is mobile

Lead generation campaigns are designed to convince cold prospects to opt-in and share their contact information. Engagement campaigns are designed to build advisor credibility, and motivate contacts to take the next step such as having a phone consultation with an advisor, or completing a more detailed investor profile to help qualify them. 2024 Marketing Prediction: "It's never been more important to share your authentic story, and to show you see the value in your own business. Go build it!" PL video content is king. Advisors with video have a 167% higher click-through rate than text only! 2024 Marketing Prediction: "Advisors who's not investing in video marketing now needs to jump on it fast. YouTube will not be considered less important in 2024." Marketing Prediction: "Marketing for financial advisors is likely to lean more towards video content. Short videos on platforms like YouTube Shorts, Instagram Reels, and TikTok could become more popular." Visually appealing. The human brain is able to process images approximately 60,000 times more quickly than the same amount of text. Mobile optimized. 30% of all advisor web traffic is mobile. Don't ask for too much. Forms that only ask for a single email or cell phone number convert leads at a higher rate than those that ask for several pieces of information. Intentional design. Limit information and keep pages free of clutter so calls to action stand out. Though email is not new or flashy, it's still the top performing marketing channel overall. Email marketing provides a direct line of communication to your audience. If you aren't gathering email address from every new lead, prospect, and client, there's a good chance you are missing out on business. Invest time into writing and testing email subject lines. An email that doesn't get open, doesn't get read. High open rates are directly correlated to two three factors: 1) List quality, 2) Subject line quality, and 3) emailing an average of at least once per week. 2024 Marketing Prediction: "The key to success in 2024 for advisors is concentration. They won't be distracted by chasing algorithms or flashy tactics. Instead, they'll focus on mastering the fundamentals and staying patient." 2024 Marketing Prediction: "Advisors will realize that momentum marketing is the key to long-term success. It is about timing your marketing, not timing your marketing." 2024 Marketing Prediction: "I'm very bullish on social media for credibility, email, SMS & mail sequences to drive action: video & events to build value, and automation & outsourcing to put it all together." We asked 22 industry experts to rank the importance of various marketing activities and channels for driving financial advisor growth in 2024. Their predictions were cited throughout this report. Some key themes are also highlighted on the following pages. Along with the data we gathered for this report, we spoke to nearly 200 advisors to find out services. They highlighted 7 key trends every advisor should know for 2024: video marketing grabs attention, tells a story in unique ways, and keeps prospects hooked. Original messaging and website copy has more impact than flashy content, but it's crucial to understand the fundamentals and stay focused on mastering the fundamentals and staying patient." 2024 Marketing Prediction: "The year we finally see a real take off in advisor marketing plans? I think so! Advisors who want to grow their influence and be relevant have to be where the people are, and that means prioritizing entertaining (not just educational) video content." Visually appealing. The human brain is able to process images approximately 60,000 times more quickly than the same amount of text. Mobile optimized. 30% of all advisor web traffic is mobile

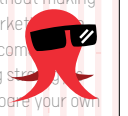
Each newsletter is promoted across multiple channels including email, social media and landing pages, delivering an omni-channel user experience that keeps your prospects and clients "in the know". 2024 Marketing Prediction: "The shift towards human-first financial guidance will accelerate in 2024. Advisors will focus on connecting more deeply with clients and prospects." Different types of content appeal to different audiences. Some prefer text-only content, whereas others more readily consume visual content. Know your audience and which resonates with them. Or, if you serve a variety of audiences with differing psychographic profiles, incorporate a variety of content types into your marketing strategy. Shorter, simpler texts outperformed longer, paragraph length messages. Placing numbers on your website, social media profiles, and landing pages drives inbound audience engagement. The final stage of the flywheel is what happens when your clients become lifelong fans - the refer you to their friends and family. While most advisors get occasional referrals, yours will get referrals and consistently only happens once you have a system in place. In this section, you'll find the learnings from conversations with thousands of advisors. Immediately after a client thanks you for something you have done, you are presented with the perfect opportunity to remind them that they can tell others about you. See a proven script for this on page 16. AI is getting more powerful by the day, but success depends on the user. Like any tool, the human touch is essential. Get ready for a year of proliferating content where it will be even harder to stand out unless you use tools like AI to help you amplify your messages in creative ways. 2024 Marketing Prediction: "AI tools will begin to make it easier for advisors to create content and streamline their marketing efforts. While AI is a powerful tool, it's crucial to maintain the human touch in your messaging." 2024 Marketing Prediction: "The year we finally see a real take off in advisor marketing plans? I think so! Advisors who want to grow their influence and be relevant have to be where the people are, and that means prioritizing entertaining (not just educational) video content." Visually appealing. The human brain is able to process images approximately 60,000 times more quickly than the same amount of text. Mobile optimized. 30% of all advisor web traffic is mobile

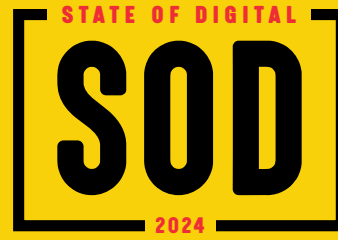
advisors

campaigns launched

data points

250,000,000,000,000





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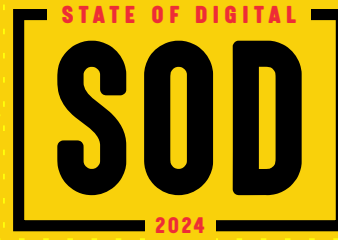
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# ABOUT THE STATE OF DIGITAL

The State of Digital is the most comprehensive report ever conducted on financial advisor marketing. Now in its 4th iteration, this report examines over 250 million data points to provide a robust view of digital marketing tactics that are currently working for advisors.

Date Range	Jan-Dec 2023
Digital Campaigns Analyzed	600,000
Emails Analyzed	67,029,119
Contacts Analyzed	38,656,824
Page Views Analyzed	38,856,288
Number of States from which data was collected	50
<b>TOTAL DATA POINTS ANALYZED</b>	<b>Over 250,000,000</b>

Where noted, some supplementary insights have been sourced from reputable outside sources.



## HOW TO GET THE MOST OUT OF THIS REPORT

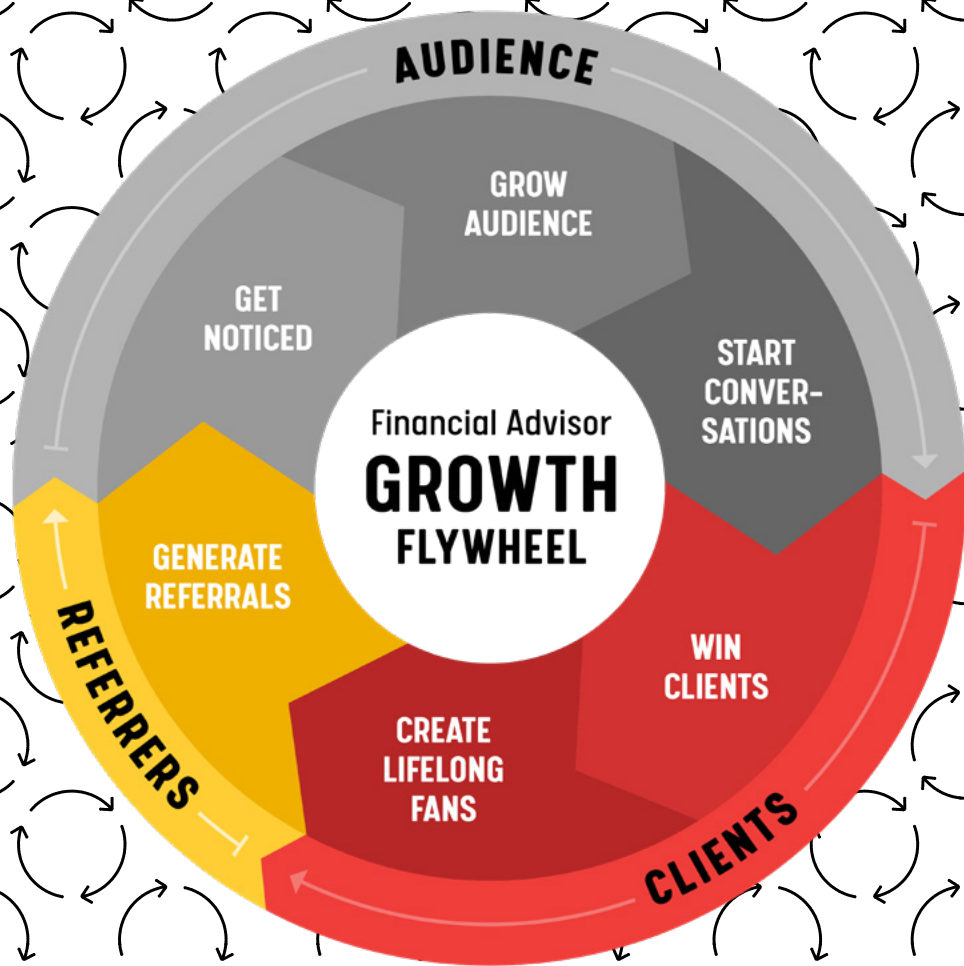
To help you quickly find the information you need, we're presenting this data in the framework of the **Financial Advisor Growth Flywheel**. The growth flywheel shows each stage of the client journey - from getting noticed and growing your audience, to creating lifelong fans and generating referrals.

To quickly zoom into the data you need, **simply flip to the flywheel stage you most want to improve**. You'll see the raw data, best practices, and even examples of top-performing content.

**Or, you can read the entire report cover to cover.** Your call.

Either way, **remember that information is most valuable when you implement it**. So choose 2-3 of your biggest opportunities, and then make a plan to implement them in your practice.

*Let's dive in.*



# The financial advisor GROWTH FLYWHEEL

*A proven model for growth*

The financial advisor growth flywheel is a proven model for growing an advisory firm. It focuses on building an audience, turning them into clients, and getting clients to refer others.

By moving people through these phases, advisors can get their “flywheel” spinning faster and drive consistent business growth.

We have chosen to present our findings within the context of this model for two primary reasons:

1

Random marketing tactics do not drive consistent results. Results come from having a complete strategy. Seeing examples and data in the context of **a flywheel will help you understand how they support an overall marketing strategy.**

2

The flywheel will **help you solve the specific marketing problems common to advisors.** Need to book more appointments from your audience? Flip to the “Start Conversations” section of the flywheel. And so on.

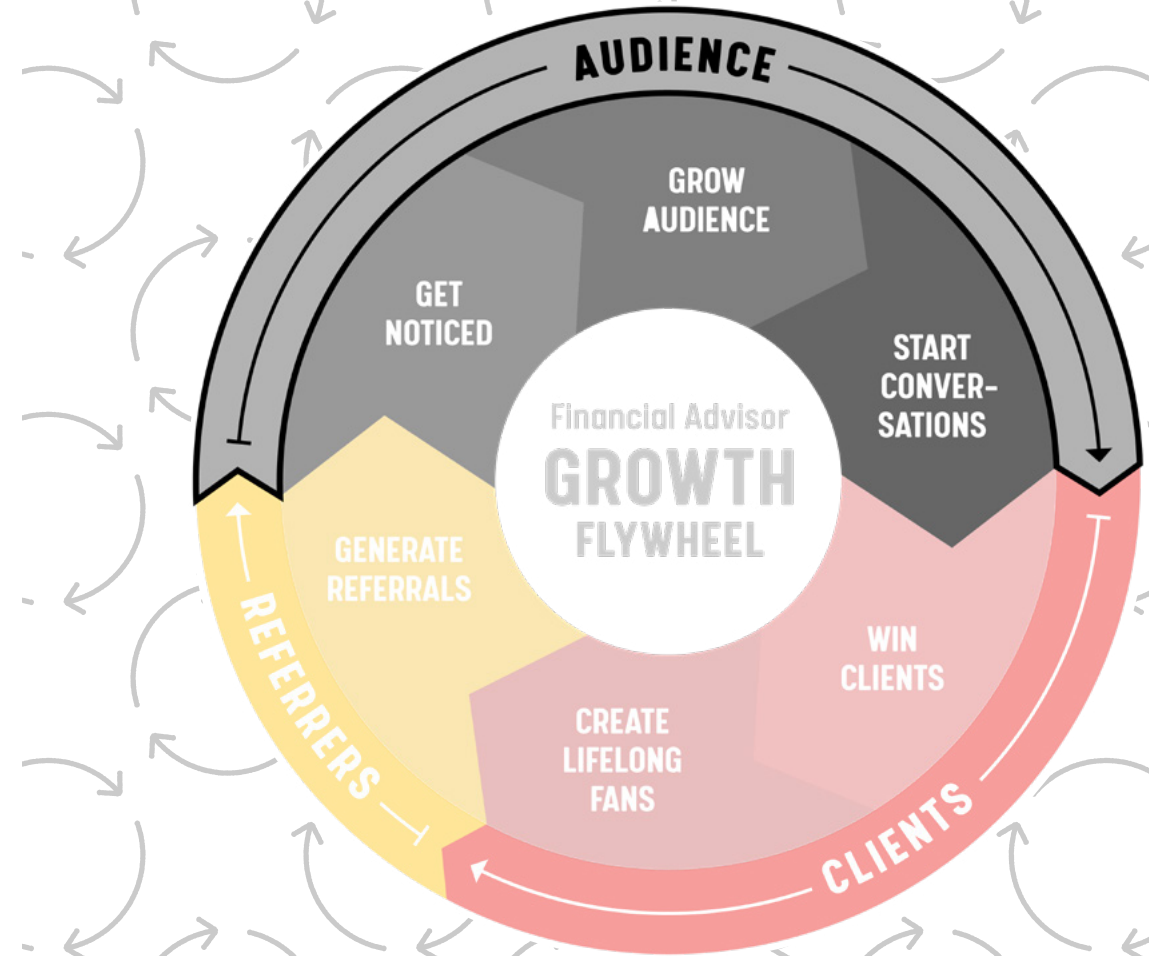
**Flywheel Stage 1:**

# AUDIENCE

Every financial advisor should have the goal of growing their audience. The larger an advisor's audience, the more opportunities they have to turn members of their audience into clients.

A financial advisor's audience includes anyone who is consuming their content.

- Email list
- Referrals
- Old contacts
- Website opt-ins
- Purchased leads
- Social media followers
- Clients (don't forget them!)



— AUDIENCE —

👁️ Get Noticed

# SEO OPTIMIZATION IS KEY TO WEBSITE PERFORMANCE



SEO, or Search Engine Optimization, is **the process of fine-tuning your website to rank higher in search engine results**. It involves optimizing content, using relevant keywords, improving website structure, and building quality links.

	Without SEO	With SEO	SEO Advantage
Average monthly new visitors (brand new visitors to your site)	3,125	<b>6,060</b>	<b>93.9%</b>
Average monthly sessions (a visitor interacts with your website)	4,046	<b>7,823</b>	<b>93.4%</b>
Average monthly pageviews (a page on your site is loaded)	13,891	<b>24,176</b>	<b>74.0%</b>



## HOW TO GET MORE VISITORS AND CAPTURE MORE LEADS FROM YOUR WEBSITE

- 1 Research and choose relevant and specific long tail keywords. Instead of “retirement planning” try “What is Amazon’s RSU vesting schedule?”
- 2 Keep your Google Business Profile, including address, phone number and website, up to date. Add photos to improve rankings.
- 3 Advisors who add a “text me” widget to their website see a 400% increase in new email opt-ins!
- 4 Add a strong call-to-action above the fold of your homepage (top half of page, visible without scrolling) where visibility is greatly increased.



*The goal is simple:*  
**when people search for relevant topics online, your site gets more visibility and clicks.**



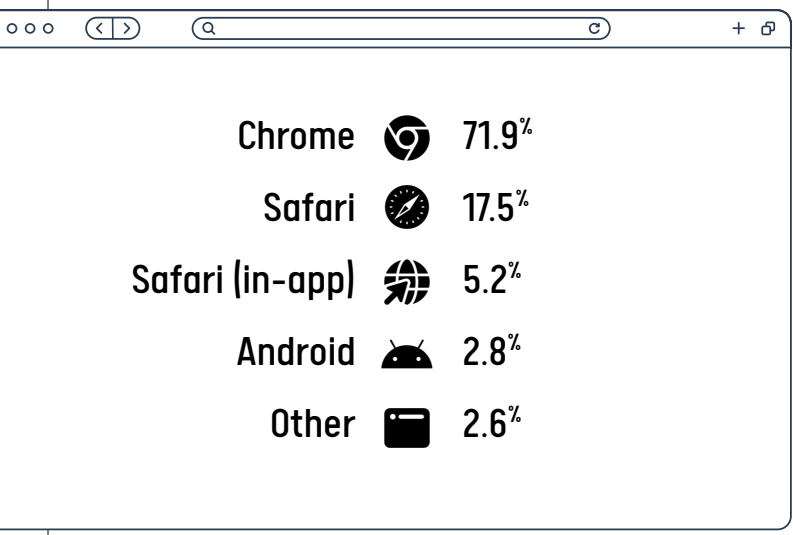
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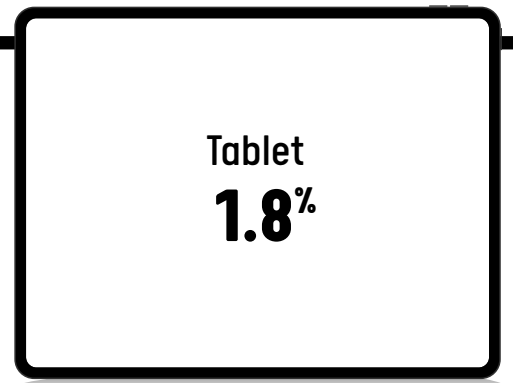
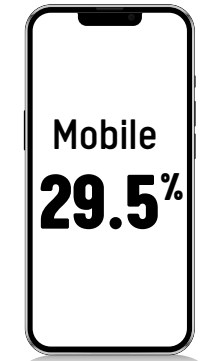
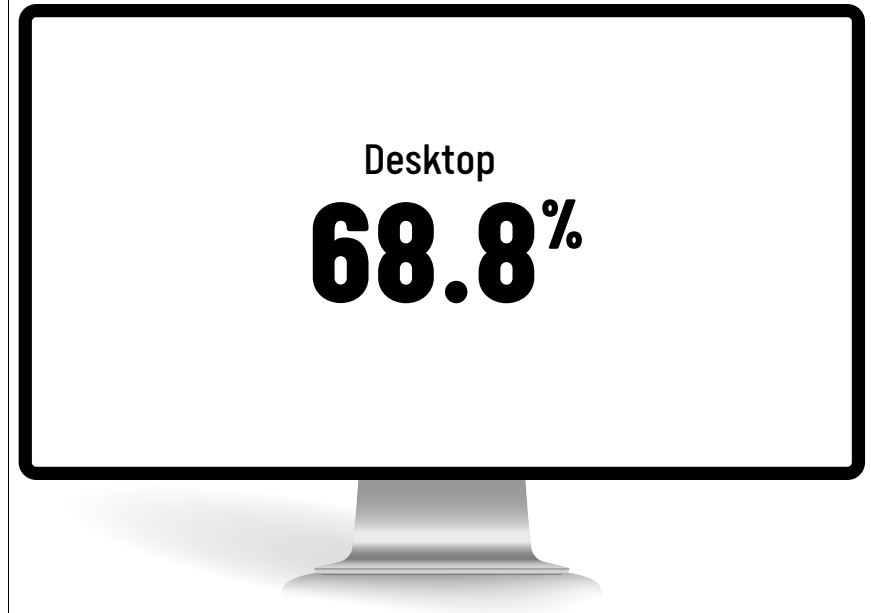
# MOBILE OPTIMIZED AND CROSS-BROWSER COMPATIBLE

The data is clear - **outdated websites** that aren't responsive to a variety of browsers and devices **will cost you business.**

## Traffic By Browser:



## Traffic By Device:



## Marketing Predictions

“As more advisors look to AI for help, we’re likely to see a higher volume of marketing materials—blogs, graphics, even videos. That’s going to make quality the big differentiator in 2024. **Marketing that feels personal and human will stand out from the crowd.**”

- *Shawna Ohm*  
Founder, Content 151

Get Noticed

# TOP-PERFORMING SOCIAL MEDIA POSTS

(Based on click rate)



## Insight

Top-performing social media content is timely, audience specific, and often features bold, high-contrast colors and attention-grabbing imagery.



FREE GUIDE: When, Why and How Should I File for Social Security?



Can You Harvest the "Fruit" of Volatility? [FREE GUIDE]



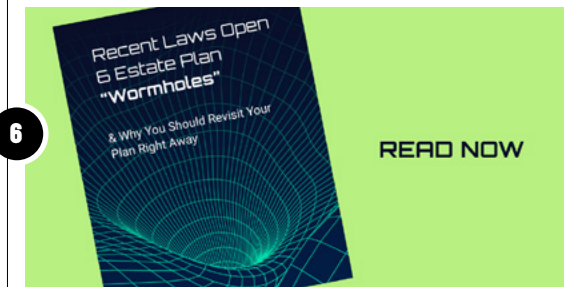
Over 50? 3 Strategies Used by Smart Investors FREE Guide



FREE December 31, 2023 Tax Guide [URGENT OPPORTUNITIES!]



Your Best Recession Ever? FREE Guide



Recent Laws May Have Disinherited Spouses






— AUDIENCE —

 Grow Audience

# LANDING PAGE AND WEBSITE TRAFFIC SOURCES

Traffic Sources:

Email	.....	54.5%
Organic Search	.....	28.7%
Organic Social Media	.....	6.8%
  		
Paid Search	.....	4.8%
Paid Social Media	.....	2.7%
Other	.....	2.5%

**Email outperforms all other traffic sources COMBINED!**

**Pro Tip**



Prioritize your marketing efforts on the highest-traffic and highest-ROI platforms.

Specifically, focus on SEO and building your email list.

**Stick with what's working!**



**Marketing Predictions**



Advisors who concentrate their efforts on **ONE single marketing activity that aligns with their natural and authentic style**, caters to the specific needs and pain points of ONE client type, and challenges them to step outside their comfort zone, will have the most success in 2024."

*- Taylor Schulte*

Founder & CEO, Define Financial

— AUDIENCE —

 Grow Audience

# TOP-PERFORMING\* LEAD GENERATION CAMPAIGNS

Lead generation is a great way to grow your email list and line up future client opportunities. **The highest converting lead generation campaigns combine an “irresistible offer” along with long-term follow up and nurturing.**

You can drive traffic to your lead generation landing page with online ads, social posts, or even emails.

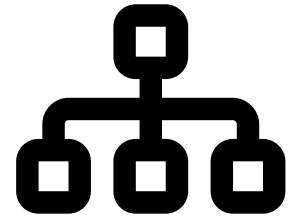
\*Based on a blended average of click rates and conversion rates across all channels  
\*\* Source: Mailchimp

## WHAT IS A “CAMPAIGN”?

A marketing campaign is a coordinated plan using various methods to promote your business.

Campaigns use multiple channels to:

- Grab people’s attention
- Get them interested
- Encourage them to take action



That action could be to register for a webinar, click a link in an email, or contact you.

## 1 Hidden Tax Opportunities

2 Estate Planning

3 Recession Survival Strategies

4 Retirement Success

5 Social Security

Average Conversion Rate:



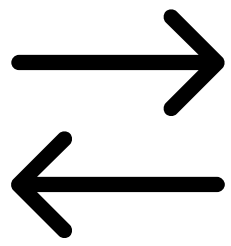
Average Conversion Rate across industries:

9.7%\*\*

— AUDIENCE —

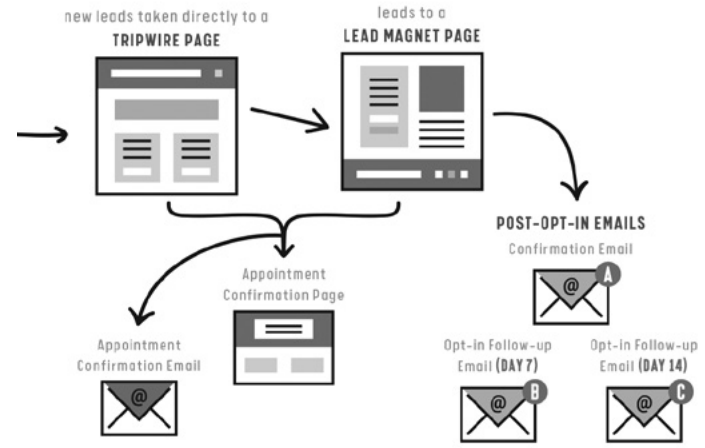
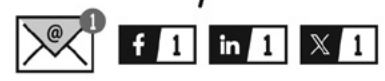
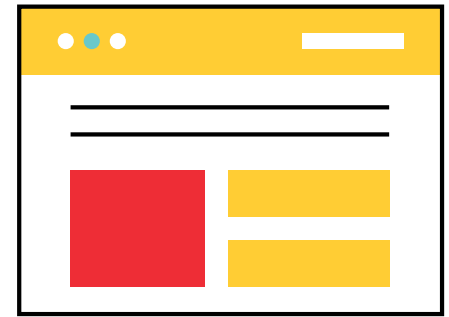
🌱 Grow Audience

# TOP 5 HIGHEST CONVERTING LANDING PAGE HEADLINES



- 1** Need Help Navigating Your 2023 "Hidden" Tax Opportunities? We'll Prepare a FREE Tax Opportunities Session
- 2** Need Help Navigating Your Legacy Plan Options? We'll Prepare a FREE Legacy Review

## LANDING OPT-IN PAGE



- 3** Need Help Navigating Your Medicare Options? We'll Prepare a FREE Medicare Plan Review
- 4** Are You Ready to Get Clear About Your Next Steps? Schedule Your Financial Clarity Call
- 5** Need Help Navigating Volatile Markets? We'll Prepare a FREE Wealth-Building Session



## Marketing Predictions

“Delivering content with a clear call to action in cohesive, educational and authentic omni-channel communications... will fuel 2024 growth.”

*- Elyse Stoner and Angela York*  
Co-Founders,  
Event Advisors  
(formerly Custom Strategic Marketing)

— AUDIENCE —

Grow Audience

# ANATOMY OF A GREAT LANDING PAGE

## Elements of a high-performing landing page:

1

**Clear and compelling call-to-action.** "Download Now" works better than "Learn more".

2

**Visually appealing.** The human brain is able to process images approximately **60,000 times** more quickly than the same amount of text.

3

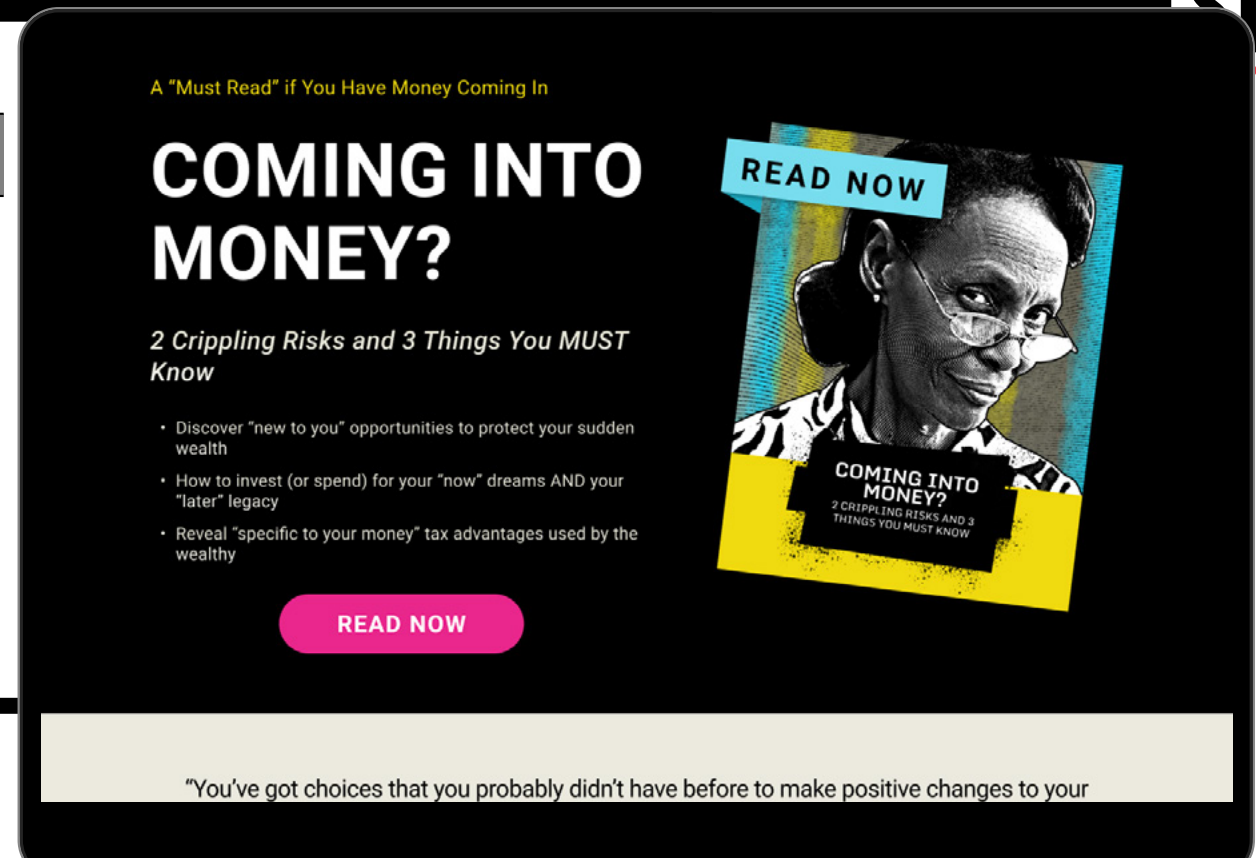
**Mobile optimized.** 30% of all advisor web traffic is mobile.

4

**Don't ask for too much.** Forms that only ask for a single email or cell phone number convert leads at a higher rate than those that ask for several pieces of information.

5

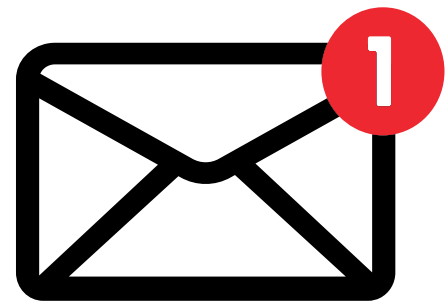
**Intentional design.** Limit information and keep pages free of clutter so calls to action stand out.



— AUDIENCE —

Start Conversations

# THE MIGHTY POWER OF EMAIL



Although email is not new or flashy, it's still the top-performing marketing channel overall. Email marketing provides a direct line of communication to your audience. If you aren't gathering email addresses from every new lead, prospect, and client, there's a good chance you are missing out on business.

## Top-Performing Subject Lines

- 1 In closing... (2022 EOY Client Letter) **92.3% open rate**
- 2 That 70s economy **57.9% open rate**
- 3 SECURE Act 2.0 (2023 changes inside) **46.9% open rate**
- 4 Making room for hope **41.7% open rate**
- 5 [Name], what makes you happy? **39.7% open rate**
- 6 Live your life anyway **38.6% open rate**
- 7 SVB and bank collapses (reassurance inside) **38.2% open rate**
- 8 Tragedy in Israel **36.1% open rate**
- 9 How does the economy look to you, [Name]? **34.5% open rate**
- 10 Full of hot air? (Floating above the turmoil) **33.4% open rate**

### Pro Tip



Invest time into writing and testing email subject lines. An email that doesn't get opened, doesn't get read. High open rates are directly correlated to three factors:

- 1) List quality, 2) Subject line quality, and 3) Emailing an average of at least once per week



## Marketing Predictions



The key to success in 2024 for advisors is concentration. They won't be distracted by chasing algorithms or flashy tactics; instead, **they'll focus on mastering the fundamentals and staying patient.**

- *Kendra Wright*

Owner + Lead Digital Marketing Strategist,  
Rebel Media Agency

— AUDIENCE —

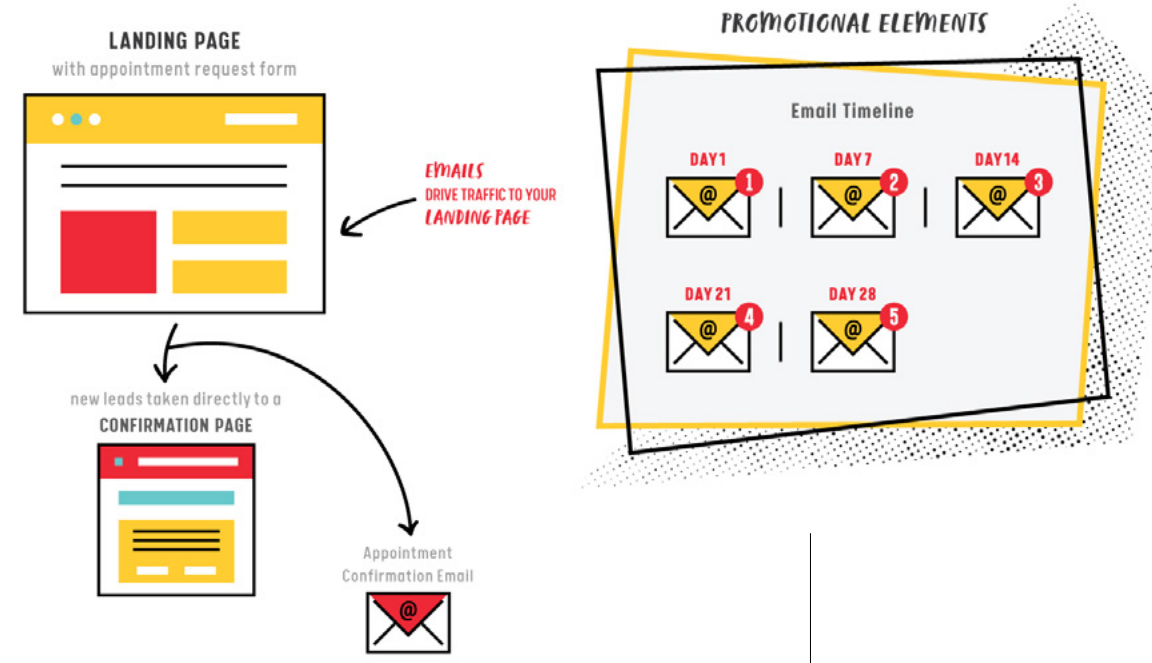
Start Conversations

# UNDERSTANDING LEAD ENGAGEMENT CAMPAIGNS

What's the difference between a lead generation campaign and a lead engagement campaign?

**Lead generation** campaigns are designed to convince cold prospects to opt-in and share their contact information.

**Engagement** campaigns are designed to build advisor credibility, and motivate contacts to take the next step such as having a phone consultation with an advisor, or completing a more detailed investor profile to help qualify them.



## Marketing Predictions

“It’s never been more important to **share your authentic voice**, and articulate how you see the world. There is an audience for you, go build it.”

- Reese Harper  
CEO,  
Elements



# TOP-PERFORMING LEAD ENGAGEMENT CAMPAIGNS



## Marketing Predictions



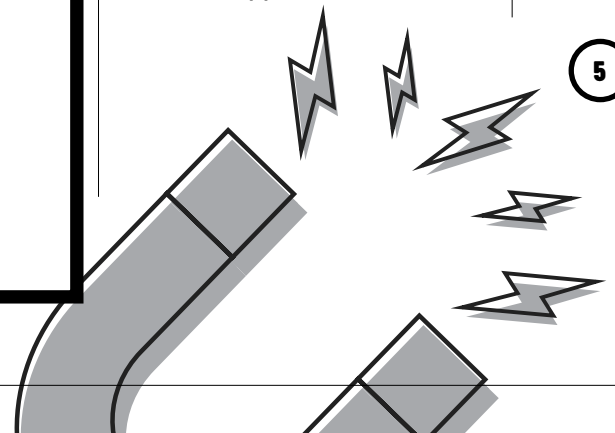
I think that advisors will realize that momentum marketing is the key to long-term success. **It is about time in marketing, not timing your marketing.**

*- Matt Halloran*

Chief Relationship Officer and Co-Founder, ProudMouth

## 1 The Surprising Truth About Market Recoveries

- 2 The Power In Uncertainty
- 3 Prospect Appointment Offer
- 4 Protecting Against Inflation
- 5 Bear Market Perspective
- 5 Recession Worries?



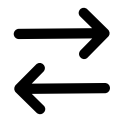
## Marketing Predictions



I'm very bullish on social media for credibility; email, SMS & mail sequences to drive action; video & events to build value; and **automation & outsourcing to put it all together.**

*- Francesca McLin*

Copywriter & Marketer, McLin Strategies



Average Click Rate:

# 37.5%

— AUDIENCE —

Start Conversations

# VIDEO EMAILS OUTPERFORM TEXT IN A BIG WAY!



**Pro Tip**



Put videos in your emails. Advisor emails with video have higher click rates and higher open rates.



## Marketing Predictions



Any advisor who's not comfortable with video marketing now, needs to get comfortable. Your audience will not be consuming less video in 2024."

- *Laura Garfield*  
Co-Founder, Idea Decanter

	Text-Only Email	Video Email
<b>Email Open Rate</b>	27.4%	59.4%
<b>Email Click-Through Rate</b>	16.7%	36.7%



# PERSONAL CONNECTION AT SCALE

Video campaigns consistently outperform

**Video campaigns have 117% better email open rates and 120% better click rates than text only!**



VIDEO LANDING PAGE  
Embedded Video & Contact/Question Form

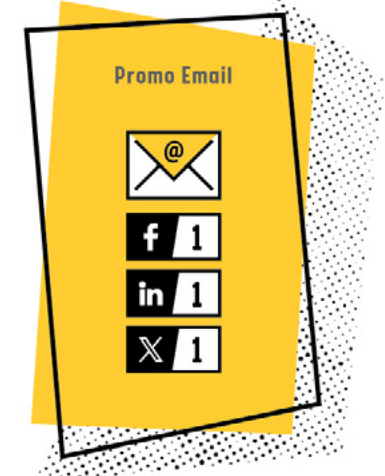


EMAIL & SOCIAL POST  
DRIVE TRAFFIC TO YOUR  
LANDING PAGE

leads to a  
QUESTION CONFIRMATION PAGE



PROMOTIONAL ELEMENTS



## Marketing Predictions

Marketing for financial advisors is likely to lean more towards video content. Short videos on platforms like YouTube Shorts, Instagram Reels, and TikTok could become more popular.”

- Josh Passler  
Graphic/Logo Designer,  
Finart

– AUDIENCE –

# KEY TAKEAWAYS

1

The latest tactics and hacks are great. But when it comes to getting results, **our research shows that tried and true approaches still win - like SEO and Email.**

2

When it comes to generating new prospect leads, **focus on specific topics that help your audience understand and solve financial problems - like taxes, or estate planning.**

3

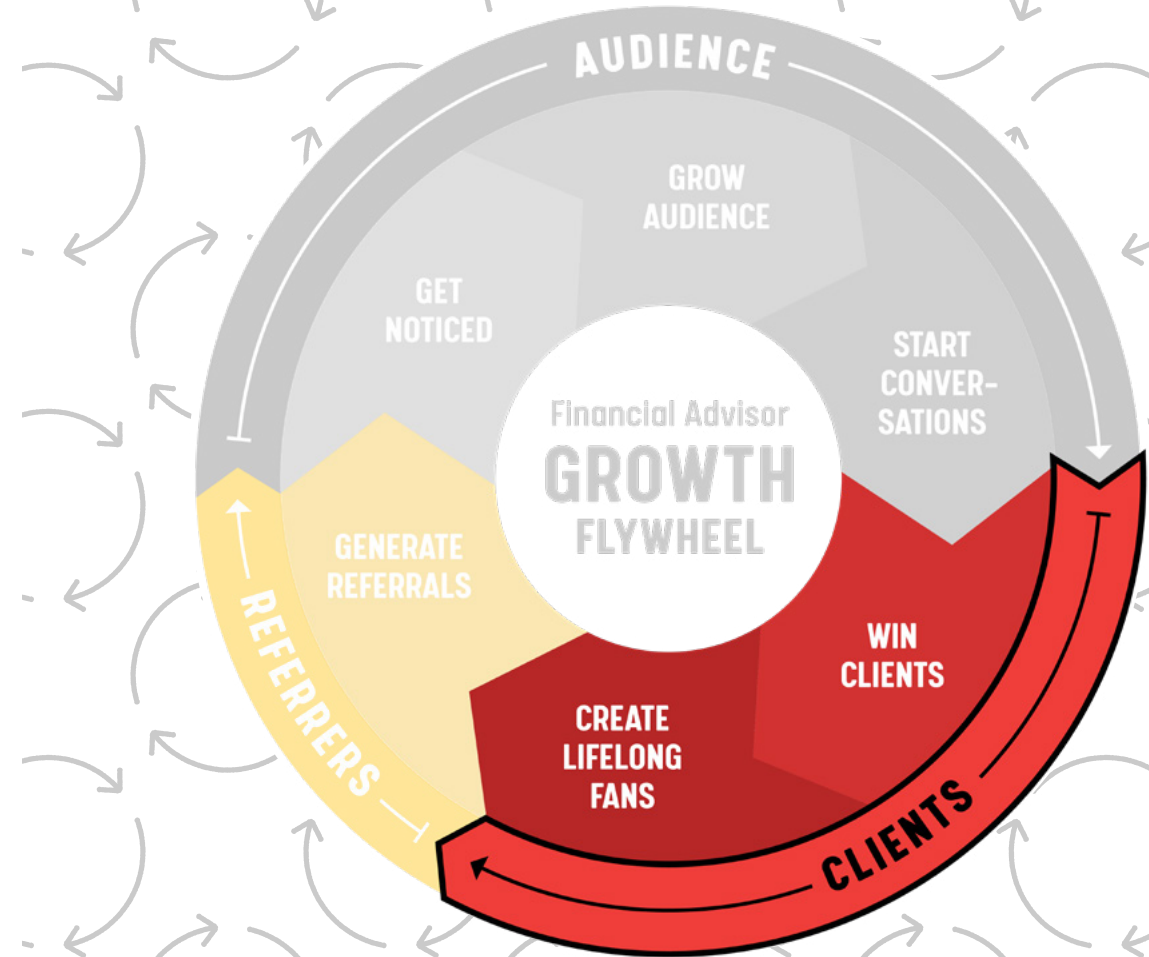
**Video is a massive opportunity in 2024.** It helps you create personal connections at scale, and most advisors aren't utilizing it.

**Flywheel Stage 2:**

# CLIENTS

**As your audience grows, a percentage of them become clients. Turning these clients into lifelong fans is what ultimately leads to a consistent stream of referrals.**

**This stage of the Advisor Growth Flywheel includes your sales process and everything you do for your clients (the service you provide, content you share, and any client appreciation “extras”).**



# TOP- PERFORMING VISUAL INSIGHTS NEWSLETTERS

Visual Insights Newsletters increase engagement by presenting popular topics and trends in a highly visual and appealing way.

Each newsletter is promoted across multiple channels including email, social media and landing pages, delivering an omni-channel user experience that keeps your prospects and clients 'in the know'.

## Ranked by engagement rate\*:

- 1 It's Getting Better **73.8% open rate**
- 2 Mental Hacks to Make Resolutions Stick **58.7% open rate**
- 3 Financial Literacy Quiz **49.3% open rate**
- 4 Simple Life Upgrades **48.4% open rate**
- 5 Strategic Philanthropy **46.6% open rate**
- 6 Creating Gratitude and Happiness **46.5% open rate**
- 7 Demystifying cryptocurrency **46.1% open rate**
- 8 Sustainable Investing **43.6% open rate**
- 9 Setting Authentic Goals in Uncertain Times **43.6% open rate**
- 10 Money Lessons We Wish We Learned Sooner **43.3% open rate**

\*Engagement rate is measured by analyzing the total number of interactions your content receives.



## Marketing Predictions



The shift towards human-first financial guidance will accelerate in 2024. Advisors will focus on **connecting more deeply with clients and prospects.**

- Ross Marino

CFP®, Founder, Transitus Wealth Partners

Average engagement rate for all Visual Insights Newsletters

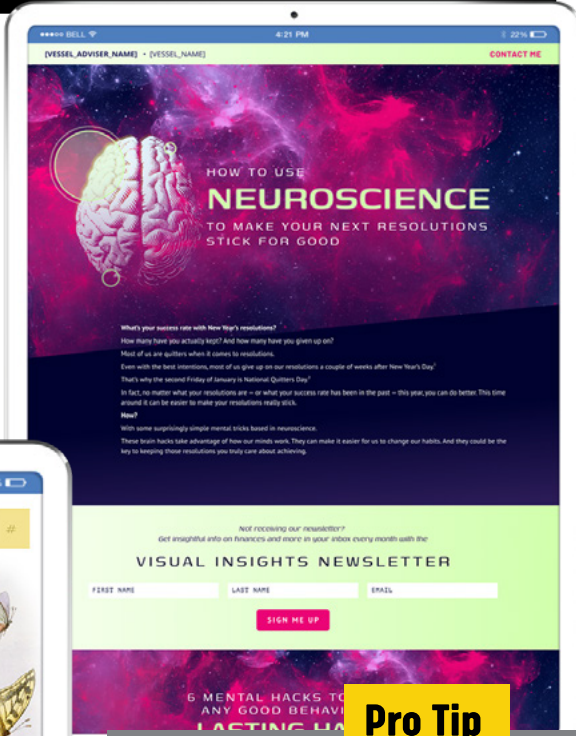
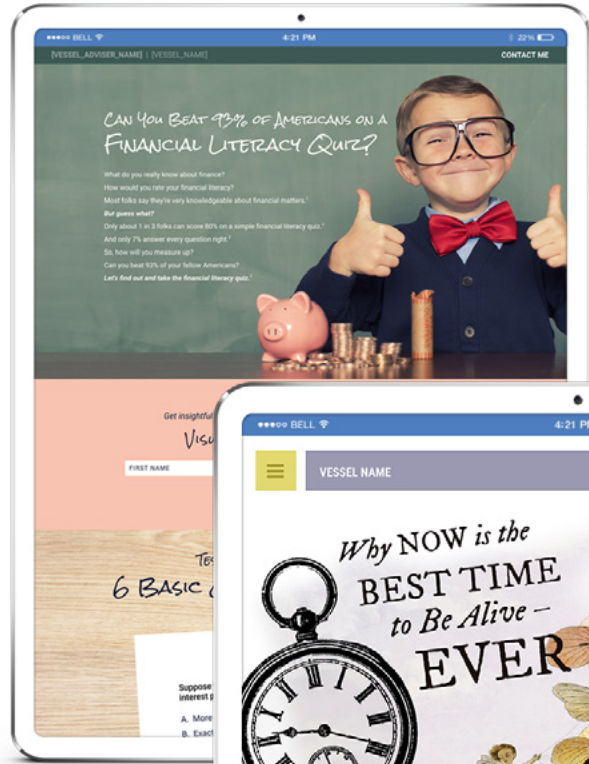
**37.5%**

— CLIENTS —

Create Lifelong Fans

# VISUAL INSIGHTS NEWSLETTERS

cont.



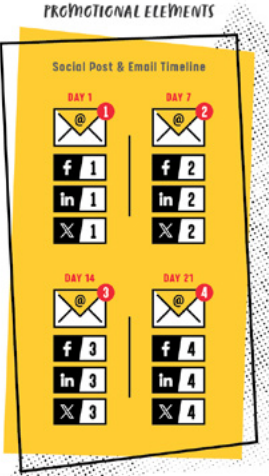
SOCIAL POSTS & ETHICALS DRIVE TRAFFIC TO YOUR LANDING PAGE



new leads taken directly to a CONFIRMATION PAGE



and receive a CONFIRMATION EMAIL  
and receive a FOLLOW-UP EMAIL (DAY 7)



**Pro Tip**



Different types of content appeal to different audiences. Some prefer text-only content, whereas others more readily consume visual content. **Know your audience and which resonates with them.** Or, if you serve a variety of audiences with differing psychographic profiles, incorporate a variety of content types into your marketing strategy.

— CLIENTS —

 **Create Lifelong Fans**

# IT'S TIME TO START TEXTING YOUR CLIENTS AND PROSPECTS

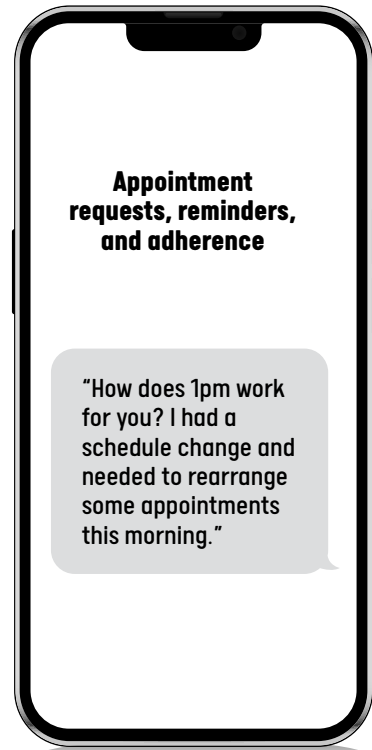
91% of consumers want to be able to send and receive texts from businesses they work with\*

**Pro Tip**



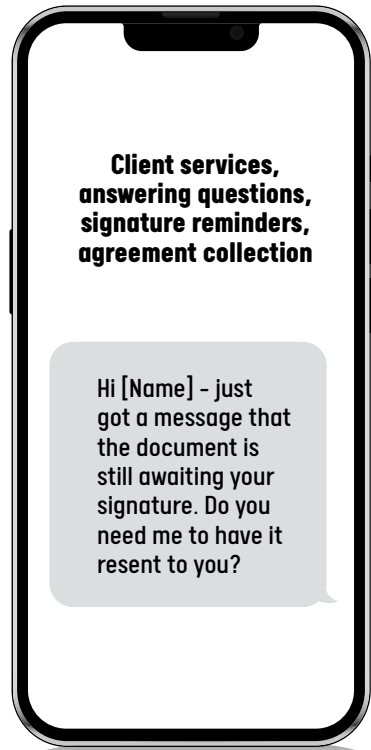
**Shorter, simpler texts** outperformed longer, paragraph length messages.

**Placing numbers** on your website, social media profiles, and landing pages **drives inbound audience engagement.**



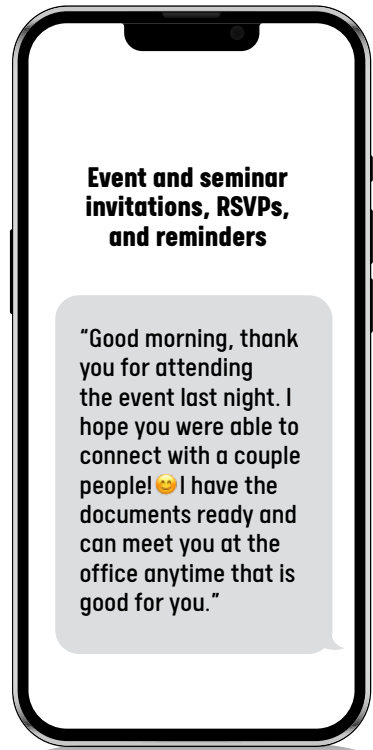
**Appointment requests, reminders, and adherence**

"How does 1pm work for you? I had a schedule change and needed to rearrange some appointments this morning."



**Client services, answering questions, signature reminders, agreement collection**

Hi [Name] - just got a message that the document is still awaiting your signature. Do you need me to have it resent to you?



**Event and seminar invitations, RSVPs, and reminders**

"Good morning, thank you for attending the event last night. I hope you were able to connect with a couple people! 😊 I have the documents ready and can meet you at the office anytime that is good for you."

Text Message Response Rate:

**97%**

faster than email

Text messages were read, on average, **within**

**43 MINS**

\*SOURCE: 2023 Attentive Mobile Consumer Report



— CLIENTS —

# KEY TAKEAWAYS

1

If you aren't texting your clients and prospects, now's a good time to start. **91% of consumers want businesses to text them** and the response rate is better than any other channel.

2

When it comes to engaging your existing clients and prospects, **focus on reassuring, educational content that helps them make strong financial decisions** for their situation.

3

**Segmenting your audience is critically important.** The type of content new prospects want to see is *very* different from what your clients want and need.

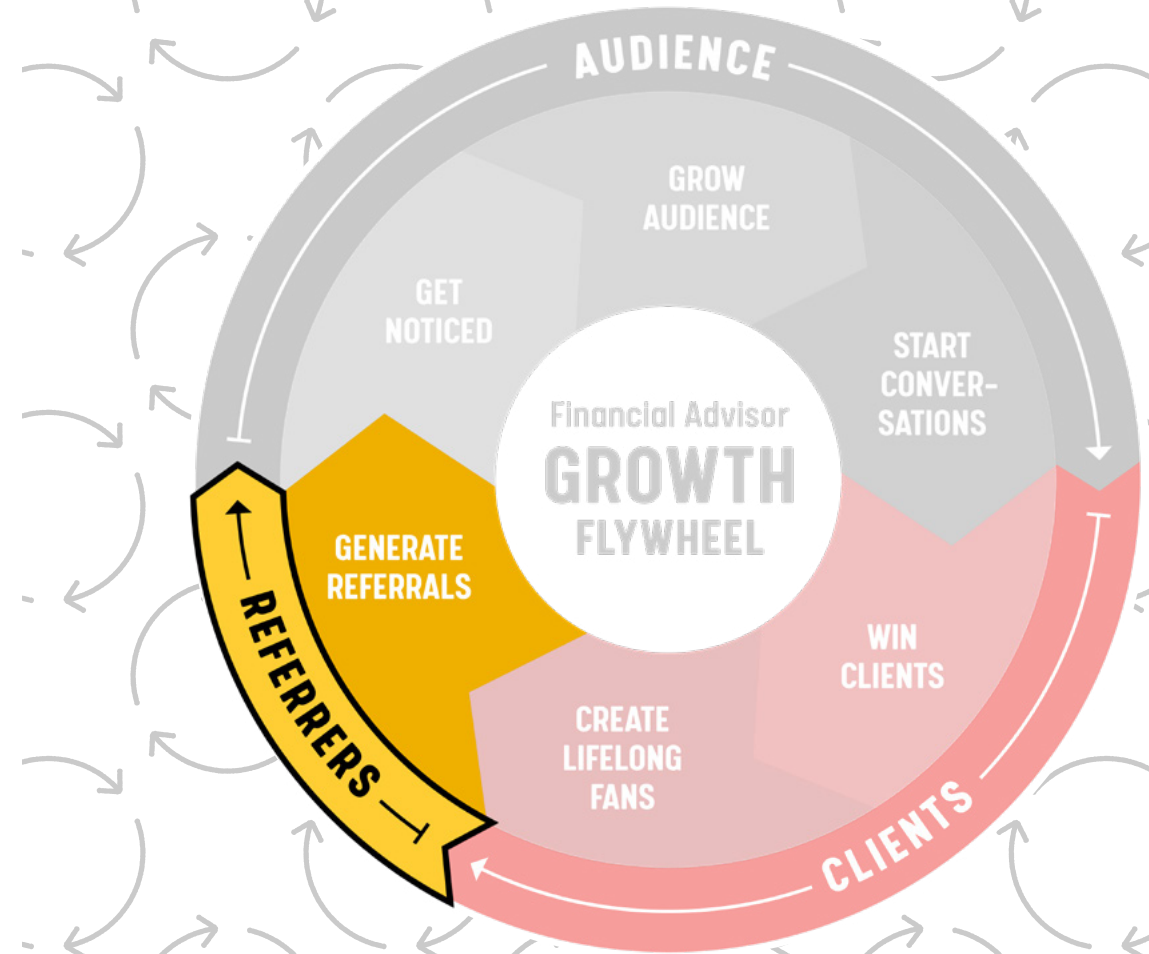
**Flywheel Stage 3:**

# REFERRERS

The final stage of the flywheel is what happens when your clients become lifelong fans and refer you to their friends and family.

While most advisors get occasional referrals, receiving them reliably and consistently only happens when you have a system in place.

In this section, we will highlight learnings from conversations with thousands of advisors.



**- REFERRERS -**

 **Generate Referrals**

# CLIENT REFERRAL IDEAS



## Marketing Predictions



Smaller, thoughtfully curated in-person events and social invitations will replace larger, less personal client appreciation events."

*- Marie Swift*  
CEO, Impact Communications, Inc.

**34% of clients reported giving a referral due to their positive experience with their advisor.\***

- 1 Ask (but in the right way). Using the script on the next page, offer clients the opportunity to help their loved ones.
- 2 Hold client events and invite people to bring guests.
- 3 Publish engaging content that followers will want to share.
- 4 Form a referral network with attorneys, realtors, other professionals, and even advisors who work in different niches.
- 5 Most of all, **create a valuable and positive experience** that will make clients want to refer you to others.

\*Source: Kitces.com, 3 Ways To Ask For Referrals More Effectively Based On Pro-Social Psychology

**- REFERRERS -**

**👥 Generate Referrals**

# A PROVEN SCRIPT FOR GETTING IMMEDIATE REFERRALS

Immediately after a client thanks you for something you have done, you are presented with the perfect opportunity to remind them that they can tell others about you. Here's how some advisors are doing it with remarkable success.

[Client expresses appreciation for something you have done]

"I'm so happy to know we've been able to help you in this way!

You might be surprised to know this, but, we meet with a lot of people whose advisors aren't doing this type of work for them.

That's why, with all the uncertainty in the markets and economy right now, we're leaving a few slots open in our calendar every week just to do free financial health checks with people our clients send to us – friends, family members, neighbors. Really anyone who would like to make sure they're getting the right care.

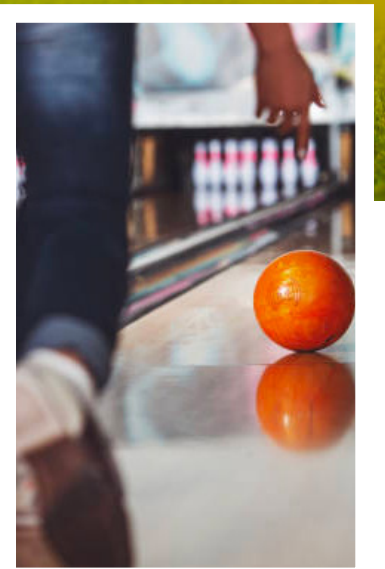
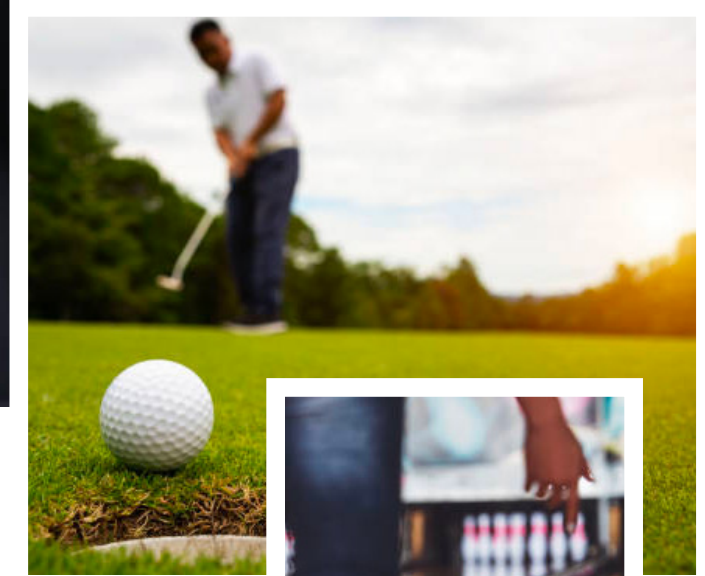
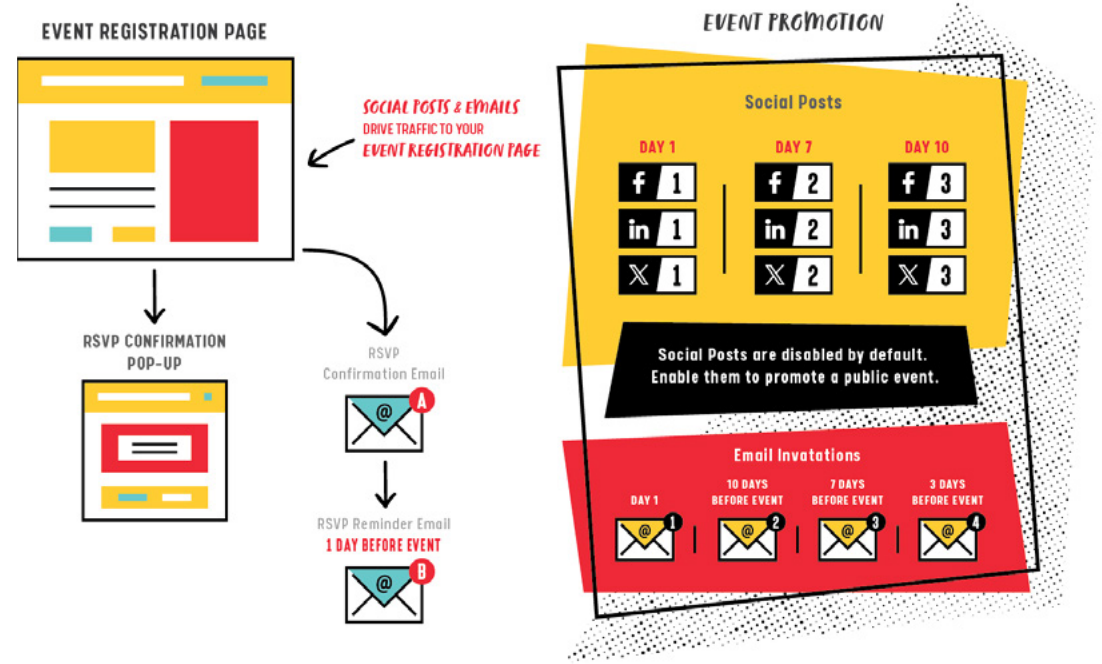
[Pause]

**Can you think of anyone who could benefit from that service?"**

**- REFERRERS -**

**Generate Referrals**

# REFERRAL EVENTS WORK!



**57%** of clients accept invitations to referral events, and on average, **34%** will bring a guest when invited to do so.

# ADVISOR BENCHMARKS

This page compares the performance of advisors using the Snappy Kraken marketing system by showing the average of all advisors vs the top 20%. The key learning here is that advisors who prioritize growing their email list and sending weekly communications achieve better marketing performance overall.



	AVERAGE	vs. TOP 20%
Average email list size	755	<b>5,097</b>
Campaigns launched per month	1.3	<b>3.6</b>
Emails sent per month	1.2	<b>2.7</b>
Open rates	28.3%	<b>29.5%</b>
Click rates	25.7%	<b>40.3%</b>
Conversion rates	3.7%	<b>4.3%</b>
Leads generated per campaign	4.5	<b>18.9</b>



- REFERRERS -

# KEY TAKEAWAYS

1

**The best time to ask for a referral is right after a client has thanked you for something.** If you want more referrals - start having the conversation with your clients more often.

2

**Client appreciation events are one of the best ways to increase referrals** - if you set them up in the right way. Asking your clients to bring a guest to your event is a great way to meet new qualified prospects.

3

**Your marketing activities matter.** Top advisors who are getting the best results put their focus on **1) growing their email list and 2) sharing new content once per week.**



# INDUSTRY THOUGHT LEADER INSIGHTS

We asked 22 industry experts to rank the importance of various marketing activities and channels for driving financial advisor growth in 2024. Their predictions were cited throughout this report. Some key themes are also highlighted on the following pages.





## HOW MARKETING EXPERTS RANK MARKETING ACTIVITIES AND CHANNELS

In addition to their 2024 Marketing Predictions throughout this report, this chart shows the average of their responses.



**Contributors:** Katie Braden, CFP®, Chief Video Officer, Advisor Video Marketing, Candice Carlton, Executive VP Advisor Marketing, FiComm, Laura Garfield, Co-Founder, Idea Decanter, Matt Halloran, Chief Relationship Officer and Co-Founder, ProudMouth, Reese Harper, CEO, Elements, Craig Iskowitz, CEO, Ezra Group, Michael Kitces, Chief Financial Planning Nerd, Kitces.com, Thomas Kopelman, Cofounder and financial planner, AllStreet Wealth, Coach Joe Lukacs, Founder, Magellan Network & Mastermind, Kristen Luke, President, Kaleido Creative Studio, Ross Marino, CFP®, Founder, Transitus Wealth Partners, Francesca McLin., Copywriter & Marketer, McLin Strategies, Shawna Ohm, Founder, Content 151, Josh Passler, Graphic/Logo Designer, Finart, Johnny Sandquist, Founder & CEO, Three Crowns Marketing, Taylor Schulte, Founder & CEO, Define Financial, Elyse Stoner and Angela York, Co-Founders, Event Advisors [formerly Custom Strategic Marketing], Marie Swift, CEO, Impact Communications, Inc., Justin Woodbury, Chief Marketing Officer, Tucker Financial Group, Kendra Wright, Owner + Lead Digital Marketing Strategist, Rebel Media Agency



## KEY THEMES EMERGE FOR 2024

Along with the data we gathered for this report, we spoke to nearly two dozen of the best and brightest marketing minds in financial services. They had 3 main takeaways that every advisor should know for 2024.

2024

### Marketing Predictions



Is 2024 the year we finally see video take off in advisor marketing plans? I think so! Advisors who want to grow their influence and be relevant have to be where the people are, and that means prioritizing entertaining (not just educational) video content.”

- *Johnny Sandquist*

Founder & CEO, Three Crowns Marketing

1

# VIDEO CONTENT IS THE FUTURE

Video marketing grabs attention, tells stories in unique ways, and keeps people hooked. On social media, email, or websites, videos make a personal connection and helps your brand stand out.

2024

### Marketing Predictions



For SEO value and to build trust at scale online **every advisor should be taking steps to master video podcasting.**”

- *Candice Carlton*

Executive VP Advisor Marketing, FiComm



2

# GREAT MARKETING FORGES PERSONAL CONNECTIONS AT SCALE

2024

## Marketing Predictions



Advisors are going to have to focus on their personal brand and their personal message. They are going to need to add massive value to their marketplace.”

- *Coach Joe Lukacs*

Founder, Magellan Network & Mastermind

2024

## Marketing Predictions



I don't think traditional marketing will go away in 2024, but **personal touch and consistent communication will be more important than ever.**”

- *Justin Woodbury*

Chief Marketing Officer, Tucker Financial Group

Authentic marketing focuses on building trust, credibility, and meaningful relationships by being clear and relatable.

This approach creates a more human connection between advisor and client, fostering satisfaction and loyalty.



3

# ARTIFICIAL INTELLIGENCE (AI) WILL CHANGE THE MARKETING GAME

2024

## Marketing Predictions



AI tools will begin to make it easier for advisors to **create content that showcases their expertise.**

- *Michael Kitces*

Chief Financial Planning Nerd, Kitces.com

2024

## Marketing Predictions



Artificial intelligence will continue to revolutionize financial advisor marketing in 2024. It will enable advisors to **deliver large volumes of highly personalized content**, significantly improving marketing effectiveness.”

- *Kristen Luke*

President, Kaleido Creative Studio

AI is getting more powerful by the day, but success depends on the user. Like any tool, the human touch is essential.

Get ready for a year of proliferating content where it will be even harder to stand out unless you use tools like AI to help you amplify your messages in creative ways.



**A NOTE FROM SNAPPY KRAKEN CEO,**

**Robert Sofia**

It was mentioned at the beginning of this report, but it's worth repeating:

***Information is only valuable when you implement it.***

There's a lot of information in this report. It would be easy to consume it all, and then move on without making any meaningful changes to your marketing.

My recommendation is to compare your own data against the data in this report. Recognize your best opportunities to improve, and then make 2-3 of them a priority to implement. Do this, and you will see a measurable impact on the growth of your business.

Need help implementing? Check out the next page...

# You focus on being an advisor, *we'll handle your marketing*

Check out

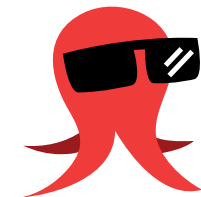
[www.snappykraken.com/freedom](http://www.snappykraken.com/freedom)

or

scan this with  
your phone camera



to learn more and find out if  
Freedom360 is right for you.



"After using Snappy Kraken for a year on my own, I decided to try Freedom360. Wow, what a difference! My clients interact more, and I've begun to receive far more inbound requests for prospect meetings. *Highly recommended!*"

- **Jeff Burrows** CFP, AIF  
President & Founder at Sierra Ocean, LLC

The #1 challenge advisors face when it comes to implementing a rock solid marketing strategy is time.

That's why we created Freedom360, a done-for-you marketing program built on the framework of the Financial Advisor Growth Flywheel. **In Freedom360, you get a done-for-you growth flywheel, so that you "win" at marketing without having to do it all on your own.**

This program is data-backed, and the results are proven. **Advisors in Freedom360 get:**

**6x**  
increase  
in traffic

**3.3x**  
increase  
in lead gen  
results

**2x**  
increase  
in booked  
appointments

**Bonus Feature:**

# SPOTLIGHT ON ENTERPRISE SUCCESS

Snappy Kraken serves over 100 advisor networks including RIAs, custodians, broker dealers, and IMOs. In addition to analyzing data holistically, we also compared how the marketing performance of different enterprises compare with each other.

Not surprisingly, some enterprises outperformed others in the results they were able to achieve.



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An advisor films a TV segment in the Advisors Excel studio.

---

# HOW TOP-PERFORMING ENTERPRISES GET THE BEST RESULTS

Enterprises achieving the best results (higher lead volume and contact engagement rates) have five things in common.

- 1 **Deploy a variety of lead generation strategies** (Seminar, Radio, TV, Online Advertising) and import all collected leads into Snappy Kraken for automatic nurturing.
- 2 **Deeply integrate marketing automation into the advisor technology stack**, connecting it with their CRM and traditional marketing channels with a strong focus on unified reporting.
- 3 **Track all marketing performance across their advisor network**, extract best practices, and then circulate success stories so that other advisors can emulate the same strategies.
- 4 **Use text-messaging for opt-ins on advertising** (Example: Text YES to 555943 to get your free copy of my Retirement Readiness report, now!)
- 5 **Offer a done-for-you support model so that advisor intervention is minimal** until leads are warm and ready to speak to an advisor.



# KEY LEARNING: STRATEGY BEATS TACTICS

The networks that drive the best marketing outcomes for their advisors are using an approach that combines

- 1) technology integration
- 2) socialization of results and best practices
- 3) human support to lighten advisor workload

**Leads from all  
channels**

*[Advertising, Website, Seminar, TV, Radio, etc.]*

**CRM**

**Reporting &  
Benchmarking**

**Success stories and  
best practices shared  
with advisors**

**Marketing  
Automation**

*More advisors motivated to participate in  
marketing activities that drive growth*

building an audience, turning them into clients, and getting clients to refer others. By moving people through these phases, advisors can get their "flywheel" spinning faster and drive consistent business growth. Random marketing tactics do not drive consistent results. Results come from having a complete strategy. Seeing examples and data in the context of a flywheel will help you understand how they support an overall marketing strategy. The flywheel will help you solve the specific marketing problems in your firm. Need to book more appointments from your audience? Flip to the "Start Conversations" section of the flywheel. And so on. Every financial advisor should have the goal of growing their audience. The larger an advisor's audience, the more opportunities they have to turn members of their audience into clients. A financial advisor's audience includes anyone who is consuming their content. SEO, or Search Engine Optimization, is the process of fine-tuning your website to rank higher in search engine results. It involves optimizing content, using relevant keywords, improving website structure, and building quality links. The goal is simple: when people search for relevant topics online, your site gets more visibility and clicks. Research and choose relevant and specific long tail keywords "Retirement planning" "What is Amazon's RSU vesting schedule?" Keep your Google Business Profile, including address, phone number and website, up to date. Add photos to improve rankings. Advisors who add a "text me" widget to their website see a 400% increase in new email opt-ins! Add a strong call-to-action above the fold (top half of page, visible without scrolling) where visibility is greatly increased. 2024 Marketing Prediction: "Smaller, thoughtfully curated in-person events and social invitations will replace larger, less personal client appreciation events." Ask (but in the right way). Using the script on the next page, offer clients the opportunity to help their loved ones. Hold client events and invite people to bring guests. Publish engaging content that followers will want to share. Form a referral network with attorneys, realtors, other professionals, and even advisors who work in different niches. Most of all, create a valuable and positive experience that will make clients want to refer you to others. "After using SnappyKraken for a year on my own, I decided to try Freedom360. Wow, what a difference! My clients interact more, and I've begun to receive far more inbound requests for prospect meetings. Highly recommended." Visually appealing. The human brain is able to process images approximately 60,000 times more

quickly than the same amount of text. Mobile optimized. 30% of all advisor web traffic is mobile. Don't ask for too much. Forms that only ask for a single email or cell phone number convert leads at a higher rate than those that ask for several pieces of information. Intentional design. Limit information and keep pages free of clutter so calls to action stand out. Though email is not new or flashy, it's still the top performing marketing channel overall. Email marketing provides a direct line of communication to your audience. If you aren't gathering email address from every new lead, prospect, and client, there's a good chance you are missing out on business. Invest time into writing and testing email subject lines. An email that doesn't get open, doesn't get read. High open rates are directly correlated to two three factors: 1) List quality, 2) Subject line quality, and 3) emailing an average of at least once per week. 2024 Marketing Prediction: "The key to success in 2024 for advisors is concentration. They won't be distracted by chasing algorithms or flashy tactics; instead, they'll focus on mastering the fundamentals and staying patient." 2024 Marketing Prediction: "I think that advisors will realize that momentum marketing is the key to long-term success. It is about time in marketing, not timing your marketing." 2024 Marketing Prediction: "I'm very bullish on social media for credibility, email, SMS & mail sequences to drive action, video & events to build value, and automation & outsourcing to put it all together." We asked 22 industry experts in rank and file. We asked 22 industry experts in rank

audience specific, and often features bold, high-contrast colors and attention-grabbing imagery. Prioritize your marketing efforts on the highest-traffic and highest-ROI platforms. Specifically, focus on SEO and building your email list. Stick with what's working! 2024 Marketing Prediction: "Advisors who concentrate their efforts on ONE single marketing activity that aligns with their natural and authentic style, caters to the specific needs and pain points of ONE client type, and challenges them to step outside their comfort zone will have the most success in 2024." Lead generation is a great way to grow your email list, and line up future client opportunities. The highest converting lead generation campaigns combine an "irresistible offer" along with with long-term follow up and nurturing. Increase engagement by presenting popular topics and trends in a highly visual and appealing way. Each newsletter is promoted across multiple channels including email, so your clients become lifelong fans - the refer you to their friends and family. While most advisors get occasional referrals, receiving them reliably and consistently only happens when you have a system in place. In this section, we will highlight learnings from conversations with thousands of advisors. Immediately after a client thanks you for something you have done, you are presented with the perfect opportunity to remind them that they can tell others about you. See a proven script for this on page TK. AI is getting more powerful by the day, but success depends on the user. Like any tool, the human touch is essential. Get ready for a year of proliferating content where it will be even harder to stand out unless you use tools like AI to help you amplify your messages in creative ways. 2024 Marketing Prediction: "AI tools will begin to make it easier for advisors to create content that showcases their expertise." 2024 Marketing Prediction: "Artificial intelligence will continue to revolutionize financial advisor marketing in 2024. It will enable advisors to deliver large volumes of highly personalized content, significantly improving marketing effectiveness." It was mentioned at the beginning of this report, but it's worth repeating. Information is only valuable when you implement it. There's a lot of information in this report. It would be easy to consume it all, and then move on without making any meaningful changes to your marketing. The #1 challenge advisors face when it comes to implementing a rock solid marketing strategy is time. My recommendation is to compare your own data against the data in this report. Recognize your best opportunities to improve, and then make 2-3 of them a priority to implement

more quickly than the same amount of text. Mobile optimized. 30% of all advisor web traffic is mobile. Don't ask for too much. Forms that only ask for a single email or cell phone number convert leads at a higher rate than those that ask for several pieces of information. Intentional design. Limit information and keep pages free of clutter so calls to action stand out. Though email is not new or flashy, it's still the top performing marketing channel overall. Email marketing provides a direct line of communication to your audience. If you aren't gathering email address from every new lead, prospect, and client, there's a good chance you are missing out on business. Invest time into writing and testing email subject lines. An email that doesn't get open, doesn't get read. High open rates are directly correlated to two three factors: 1) List quality, 2) Subject line quality, and 3) emailing an average of at least once per week. 2024 Marketing Prediction: "The key to success in 2024 for advisors is concentration. They won't be distracted by chasing algorithms or flashy tactics; instead, they'll focus on mastering the fundamentals and staying patient." 2024 Marketing Prediction: "I think that advisors will realize that momentum marketing is the key to long-term success. It is about time in marketing, not timing your marketing." 2024 Marketing Prediction: "I'm very bullish on social media for credibility, email, SMS & mail sequences to drive action, video & events to build value, and automation & outsourcing to put it all together." We asked 22 industry experts in rank

Lead generation campaigns are designed to convince cold prospects to opt-in and share their contact information. Engagement campaigns are designed to build advisor credibility, and motivate contacts to take the next step such as having a phone consultation with an advisor, or completing a more detailed investor profile to help qualify them. 2024 Marketing Prediction: "It's never been more important to share your authentic voice, and articulate how you see the world. There is an audience for you, go build it." Put videos in your emails. Advisor emails with video have a 216% higher click rate than text only! 2024 Marketing Prediction: "Any advisor who's not comfortable with video marketing now needs to get comfortable. Your audience will not be consuming less video in 2024." 2024 Marketing Prediction: "Marketing for financial advisors is likely to lean more towards video content. Short videos on platforms like YouTube Shorts, Instagram Reels, and TikTok could become more popular." Visually appealing. The human brain is able to process images approximately 60,000 times more quickly than the same amount of text. Mobile optimized. 30% of all advisor web traffic is mobile. Don't ask for too much. Forms that only ask for a single email or cell phone number convert leads at a higher rate than those that ask for several pieces of information. Intentional design. Limit information and keep pages free of clutter so calls to action stand out. Though email is not new or flashy, it's still the top performing marketing channel overall. Email marketing provides a direct line of communication to your audience. If you aren't gathering email address from every new lead, prospect, and client, there's a good chance you are missing out on business. Invest time into writing and testing email subject lines. An email that doesn't get open, doesn't get read. High open rates are directly correlated to two three factors: 1) List quality, 2) Subject line quality, and 3) emailing an average of at least once per week. 2024 Marketing Prediction: "The key to success in 2024 for advisors is concentration. They won't be distracted by chasing algorithms or flashy tactics; instead, they'll focus on mastering the fundamentals and staying patient." 2024 Marketing Prediction: "I think that advisors will realize that momentum marketing is the key to long-term success. It is about time in marketing, not timing your marketing." 2024 Marketing Prediction: "I'm very bullish on social media for credibility, email, SMS & mail sequences to drive action, video & events to build value, and automation & outsourcing to put it all together." We asked 22 industry experts in rank

Each newsletter is promoted across multiple channels including email, social media and landing pages, delivering an omni-channel user experience that keeps your prospects and clients "in the know." 2024 Marketing Prediction: "The shift towards human-first financial guidance will accelerate in 2024. Advisors will focus on connecting more deeply with clients and prospects." Different types of content appeal to different audiences. Some prefer text-only content, whereas others more readily consume visual content. Know your audience and which resonates with them. Or, if you serve a variety of audiences with differing psychographic profiles, incorporate a variety of content types into your marketing strategy. Shorter, simpler texts outperformed longer, paragraph length messages. Placing numbers on your website, social media profiles, and landing pages drives inbound audience engagement. The final stage of the flywheel is what happens when your clients become lifelong fans - the refer you to their friends and family. While most advisors get occasional referrals, receiving them reliably and consistently only happens when you have a system in place. In this section, we will highlight learnings from conversations with thousands of advisors. Immediately after a client thanks you for something you have done, you are presented with the perfect opportunity to remind them that they can tell others about you. See a proven script for this on page TK. AI is getting more powerful by the day, but success depends on the user. Like any tool, the human touch is essential. Get ready for a year of proliferating content where it will be even harder to stand out unless you use tools like AI to help you amplify your messages in creative ways. 2024 Marketing Prediction: "AI tools will begin to make it easier for advisors to create content that showcases their expertise." 2024 Marketing Prediction: "Artificial intelligence will continue to revolutionize financial advisor marketing in 2024. It will enable advisors to deliver large volumes of highly personalized content, significantly improving marketing effectiveness." It was mentioned at the beginning of this report, but it's worth repeating. Information is only valuable when you implement it. There's a lot of information in this report. It would be easy to consume it all, and then move on without making any meaningful changes to your marketing. The #1 challenge advisors face when it comes to implementing a rock solid marketing strategy is time. My recommendation is to compare your own data against the data in this report. Recognize your best opportunities to improve, and then make 2-3 of them a priority to implement



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