

INDUSTRY REPORT BY ADVISOR WEBSITES

# Fueling Growth. Powering Personalization.

*How Financial Advisors Can Supercharge Growth  
Through Personalized Marketing in the Digital Era.*



# Table Of Contents

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The State of Digital Marketing for Financial Advisors .....	3
What's Covered in This Report .....	5
<b>#1 Targeted Audiences</b>	
Marketing to a Specific Target Audience Increases ROI .....	6
<b>#2 Digital Web Presence</b>	
Generic Websites No Longer Cut It .....	8
<b>#3 Content Marketing</b>	
Content Drives the Best Results When Personalized .....	10
<b>#4 Social Media</b>	
Advisors are Creating Personal Connections on Social Media .....	14
<b>#5 Automation</b>	
Automation + Personalization Can Skyrock Results .....	16
<b>Key Take-Aways</b>	
Personalized Digital Experiences Drive Better Results .....	17



# The State of Digital Marketing for Financial Advisors

It's no secret that the worldwide pandemic had major impacts across many industries. For the financial services sector and countless others, the adoption of technology – particularly digital – experienced massive acceleration.

As we watched the markets fluctuate rapidly at the beginning of the pandemic and the uncertainty the virus brought to our futures, many consumers turned online to search for financial advice with new purpose and an extreme sense of urgency. Consequently, advisors also experienced new limitations as typical client (current and potential) interactions were brought to a near halt.

It's undeniable that having a website and digital presence is no longer a "nice to have" but is now the new standard for all financial advisory firms. In fact, with **70% of consumers indicating that a website alone drives their purchasing decisions<sup>1</sup>**, your prospects are expecting to engage with your business online.



*Is simply being online enough to cut through a sea of clutter?*

The short answer is NO.

With this critical shift, *thousands* of financial advisory firms are working to strengthen their online presence, bringing new and more prevalent challenges to the competitive landscape. How do you cut through the clutter, stand out and make a great first impression online when your prospects and clients are presented with an abundance of online choices?

## The Answer: Provide Your Audience with Personalized Digital Experiences

To successfully grow your business online, it's critical to lead with purpose and intent by delivering personalized digital experiences to your target audience. Oftentimes, advisors fall into the trap of "marketing just for the sake of marketing," rather than connecting with meaning. As a result, they end up missing the mark and wasting time and resources with little to no outcome.



Today's tech-savvy consumers have heightened expectations of brands, making personalized digital experiences key to a successful marketing strategy. Here's why:



**95%**

of companies that saw 3x ROI from their personalization efforts increased profitability in the following year.<sup>2</sup>



**87%**

of companies that have implemented web personalization have seen an increase in return on key metrics. Nearly half saw 20%+ uplift.<sup>3</sup>



**63%**

of consumers expect personalization as a standard of service.<sup>4</sup>



**80%**

of consumers are more likely to make a purchase when brands offer personalized experiences.<sup>5</sup>

To uncover just how essential personalized digital experiences are, we surveyed our most successful customers and combined it with recent, compelling industry trends. According to our latest survey of nearly 500 advisors, we found:

## There Are Five Critical Areas of Digital Marketing that Personalization Has Impacted.



## What are personalized digital experiences, and why should I care?

Personalized digital experiences mean delivering relevant and targeted content to the appropriate audience. Financial advisors can achieve this through targeted website messaging, blog articles, videos, email newsletters, or social media interactions that you know resonate with your audience. Creating personalized digital experiences ensures that every touchpoint they make with your business speaks directly to their unique needs and addresses their pain points.

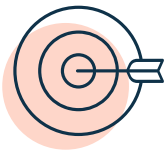
In today's increasingly competitive marketplace, delivering contextual and relevant customer experiences is critical to capture attention and meet consumers' expectations.

When your prospects can easily and quickly see that you're the solution to their problem or need, your efficiency and bottom line skyrockets. That's because personalization helps advisors stand out, build trust, drive engagement, and strengthen relationships.



# What's Covered in This Report:

This report guides us through the changes in these five fundamental areas of a personalized digital marketing strategy.



## #1 – Targeted Audiences

To drive growth, advisors are creating a strong foundation for their digital marketing by narrowing their target market and focusing on specific needs.



## #2 – Web Presence

Instead of generic websites that do little to create value and may even fuel negative experiences, advisors are strategically launching websites that speak directly to their focused target market.



## #3 – Content Marketing

Audiences are flooded with online content every day, making it critical for advisors to create content that is targeted, relevant and geared towards their customers' needs.



## #4 – Social Media

By sharing personalized content on their social media accounts, advisors are extending their reach farther and quickly building trust with their audience by humanizing their brand.



## #5 – Automation

Once unlocking the secret to success in personalization and targeted marketing, automation gives advisors a leg up, boosting results with less financial investment and fewer hours spent.



Founded in 2012, **Advisor Websites** specializes in helping financial advisors stand out and grow their business online with conversion-friendly, personalized websites and targeted digital marketing solutions, all which follow FINRA and SEC guidelines.

For more information about our personalized approach to digital marketing, visit [www.advisorwebsites.com](http://www.advisorwebsites.com).

# Marketing to a Specific Target Audience Increases ROI

71% of companies that exceed revenue and lead goals have their target audiences identified and documented<sup>6</sup>

With the fast adoption of digital practices seen in recent years, successful advisors are becoming more strategic with their digital marketing. This includes establishing clear and focused target markets to guide their efforts.

Advisors with a clearly defined target market drive incredible results. They take the time to understand the needs and pain points of their audience first, which builds a strong foundation for all their marketing activities. This ensures their time and resources are well-spent on their most valuable segments.

Advisors that don't take the time to identify and understand who to focus their efforts on (AKA the ideal client) make the mistake of casting their marketing net too wide and lowering their chances of converting leads into clients. The more value your audience sees in your business, the higher the chance of conversion. It's impossible to provide valuable, personalized digital experiences without understanding who you're creating them for. Furthermore, advisors that have clear and focused messaging on their website are seeing higher ROI since websites targeted to a specific audience are **2 to 5 times more effective and easier to use**<sup>7</sup> by targeted users. If your firm currently does not have your target market documented, you're not alone.



## Focused Target Market:

A specific and identified segment of an advisor's overall target market, a Focused Target Market is specific to each advisor and/or firm and is reflective of their ideal client base.



## ADVISOR WEBSITES' SURVEY DATA:

**89%**

of advisors we surveyed said they **understand who their target market** and ideal clients are.

**48%**

of survey respondents said they **know their target market** but DO NOT have it documented.



*Advisors who do not have their target audience clearly defined are missing out on opportunities to grow their business by not focusing their marketing efforts.*

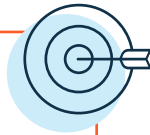
## Get the Most out of Your Digital Marketing by Creating a Focused Target Market

### Here's How to Get Started:

To understand your focused target market, create a fictionalized portrayal of your ideal customer(s) by painting a life-like picture of who that customer is. Consider more than just demographics like age, gender, location, income, etc. Dig deeper by considering psychographics, including aspects like interests, opinions, emotional needs, behavior, life challenges, lifestyle habits, etc. Each of these should be carefully considered in terms of how they relate to your business' solutions and how your distinct financial services can help them.

#### THINGS TO CONSIDER:

- ✓ What attributes do your current clients have in common?
- ✓ Which of your clientele segments are the most profitable?
- ✓ Which of your clients are the most satisfied with your services?
- ✓ How are your clients finding you? Where are they coming from?
- ✓ What other information have you captured in your database that can help identify qualities of high-value audiences?



## The Importance of Targeting Your Efforts

To ensure a successful marketing strategy, it is critical to understand who you're targeting and then create highly tailored content and messaging that resonates with your intended audience.

What makes a documented focused target market effective is that it provides a more detailed picture of the needs of your target audience as it relates to the financial services you are offering. It brings a deeper understanding of potential decision-making factors your prospects may be considering, which allows advisors to provide highly relevant and effective marketing material.

Having a focused target market documented and accessible company-wide makes a large impact on marketing ROI. In fact, **71% of companies that exceed revenue<sup>9</sup>** and lead goals have documented target audiences.



In a world where consumers of financial advice and solutions are seeking professionals to get the most relevant guidance appropriate for them, it is essential that advisors position themselves as an expert for a very specific target persona. When we think about having a critical need in our own family- such as medical care, we tend not to seek out just the nearest doctor, but rather the best specialist that we can access. By nature we look for the best resource who understands our specific condition, environment or options.

So whether the attempts to gain customers are intentionally attracting them to one's advisory firm and find us through our searched or human-verified expertise, without a target market persona that is well developed and communicated, advisors are going to have a very challenging time setting themselves apart from the masses of professionals.

- Adam Holt, CEO, **Asset-Map**

**asset+map**

## Generic Websites No Longer Cut It

74% of customers feel frustrated when website content is not personalized<sup>9</sup>

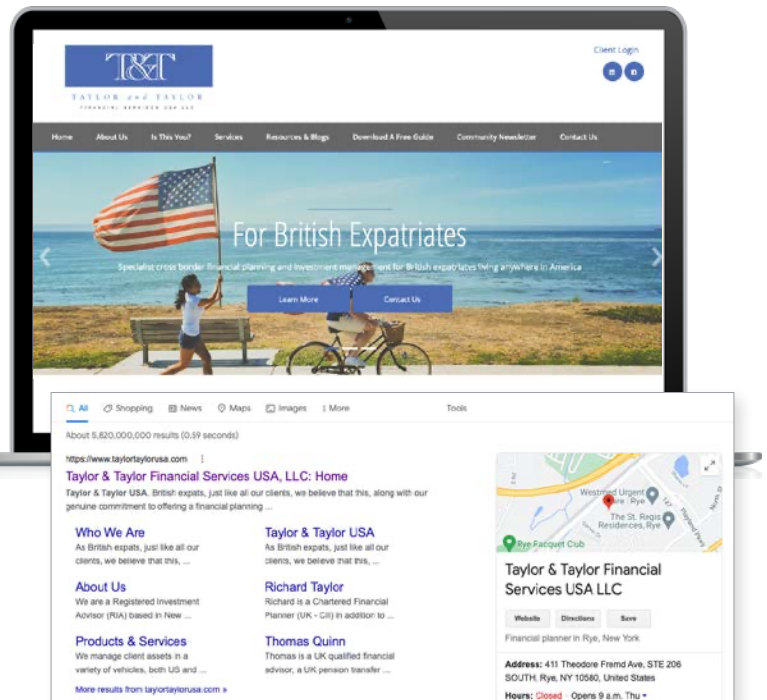
More than ever, people are turning online for financial advice. In fact, **80% of prospects are doing their own research online before choosing their financial advisor**,<sup>10</sup> which means your website is likely the first impression your business makes. Advisors whose website design and messaging do not address their ideal clients' needs are missing the mark, losing out on qualified traffic and leads to competitors who are embracing the shift to personalized digital experiences.

With thousands of competing financial advisors turning up in search results, advisors can no longer rely on generic website designs and messaging. It's simply not enough to drive results in today's digital world.

### ADVISOR WEBSITES' CASE STUDY:

#### Customer Sites Who See the Most Traffic and User Engagement Are Highly Personalized to Their Audience

Our top-visited customer sites are highly optimized and personalized to rank in search engines. Have a look at **Taylor and Taylor**:



### What is SEO?

Search Engine Optimization (SEO) is the process of improving the quality and quantity of your website's traffic from search engines like Google.

SEO can be complex, but there are basic elements that can be personalized to attract your focused target market to your website while also conveying to search engines that the content you're sharing is relevant, provides value, and that your reputation is something they are comfortable promoting. To further improve the appearance of your content for search engines, meta titles and meta descriptions can be used to provide short summaries of what customers can expect to find on your website.

Sites like this bring in the highest amount of website traffic from new visitors because they attract the right customers at the time of their search. This is done by using SEO best practices like personalized title tags and meta descriptions that speak to their ideal client, British Expatriates living in the United States. Once on the site, the user experience is tailored to their target audience, leading to lower bounce rates and an overall better user experience.



## Targeted Messaging Affects Conversion Rates

Once you've caught your audience's attention, it's time to use personalization to help convert them from visitor to client.

More specifically, your CTA (call to action) buttons make a substantial difference in your ability to convert website traffic into leads. **Hyper-relevant CTAs**<sup>11</sup> increase conversion rates for online businesses. In fact, a recent study found that **personalized CTAs perform 202% better**<sup>12</sup> than default calls to action.



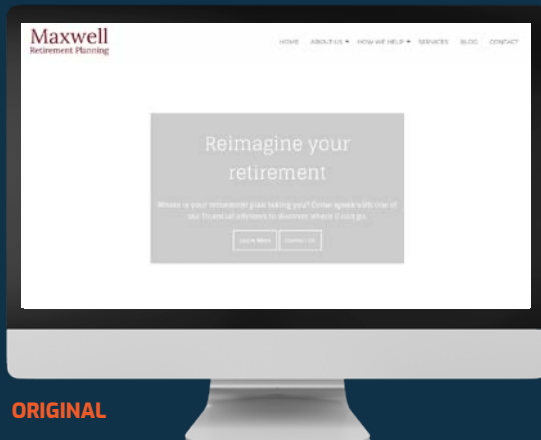
*Let's cut to the chase - generic web design doesn't drive results.*

From your audience's perspective, you have **approximately 7 seconds**<sup>13</sup> to communicate to them that you're the best advisor for their needs. And that can be difficult to do if your homepage messaging doesn't get to the point, fast. In fact, **72% of consumers**<sup>14</sup> say they **ONLY** engage with personalized messaging.

## Here's a great example:

There are distinct differences in user experience between these two websites, and it's make-or-break when it comes to keeping the user engaged and on your site.

Within seconds, it's evident which website is more tailored and specific to their target audience. For a physician comparing these two financial advisors, determining who is a better fit for their individual needs is made easy since the copy, CTAs and overall design is tailored to speak specifically to physicians.



ORIGINAL



PERSONALIZED



Google searches for financial services products have surged since the pandemic, marking a major shift in where consumers look to first. But don't count on this changing anytime soon. Digital adoption hasn't just accelerated; it's taking root. Creating personalized digital experiences with highly relevant content for specific customers is more critical today than ever before. Otherwise, advisors lose out to the company that grabbed their attention first.

- Mary York, CEO, **York Public Relations**



## Content Drives the Best Results When Personalized

Nearly 80% of consumers say that personalized content increases their purchase intent<sup>15</sup>

Content is an essential element of your marketing strategy; it drives traffic to your website and builds authority, trust, loyalty and credibility with your audience online. Plus, it keeps them engaged!

But here's the key: content drives the best results when it's personalized and tailored to speak directly to your ideal client. Therefore, it's crucial to have a documented focused target market serving as a guiding light for all your marketing communications.

### ADVISOR WEBSITES' CASE STUDY:

#### Advisor Websites' Top Converting Customer Websites Are Personalized to Their Target Audience Needs

Our top lead-generating customer websites with **conversion rates of 30%+** are those that have mastered a personalized content experience for their focused target market and are customized in both design and messaging.

**Uma Financial** does a terrific job using visuals and messaging to not only speak to their target audience in the medical space but also address their specific pain points. Notice the placement of the message – the target market is mentioned right on the homepage hero banner heading.

Content marketing **generates 3x as many leads as traditional marketing and costs on average 62% less.**<sup>16</sup> When content is created with your ideal client in mind, it becomes an incredible tool to generate more leads and grow your bottom line.

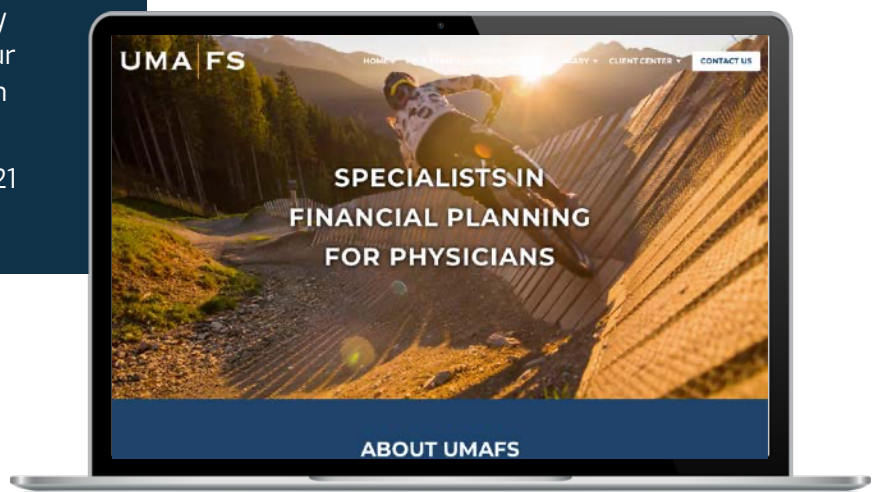


### What is Content Marketing?

"Content marketing is a strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly-defined audience – and, ultimately, to drive profitable customer action.

Instead of pitching your products or services, you are providing truly relevant and useful content to your prospects and clients to help them solve their issues."

- Content Marketing Institute, 2021



## Personalized Content Marketing Drives Results in Three Key Ways:



### Attracts Your Audience

Year-over-year growth in unique **site traffic is 7.8x higher for content marketing**<sup>17</sup> leaders compared to followers (19.7% vs 2.5%).



### Builds Trust & Credibility

Nearly **80% of consumers**<sup>18</sup> say that personalized content increases their purchase intent.



### Converts Visitors into Clients

Conversion rates are nearly **6x higher for content marketing adopters** than non-adopters (2.9% vs 0.5%).<sup>19</sup>

However, content marketing will only benefit your business in these ways if it offers real value to your audience.

Personalized content builds trust with your website visitors, which in turn, moves them down the funnel and through their decision process faster. In fact, over half of companies that implement personalization into their content marketing **reported a lift of 10% or greater across their marketing goals**,<sup>20</sup> with improved conversion rates and customer engagement.



*Content must be personalized and tailored to your audience's needs and pain points to provide value and generate results.*



Consumers today have a strong desire to feel seen and heard. This creates a huge marketing opportunity for the financial advisors brave enough to narrowly define their ideal client and hyper-personalize their content to serve their ideal customer.

Most financial advisors feel constrained by target markets, when in reality we see advisors with the narrowest possible markets having the greatest conversion rates. Why? Because they are creating personalized content (and I'm not talking about mail-merge personalization here) that says, "I see you, I hear you, and I am here to serve you." This type of digital interaction is how advisors today are redefining the prospect and client experience for ultimate success.

- Megan Carpenter, CEO, **FiComm Partners**



## ADVISOR WEBSITES' CASE STUDY:

### Personalized Video Content Drives the Most Engagement and Keeps Eyes on your Brand, Longer

Our financial advisor customers at Parkhurst Financial Services posted and shared a video, "**First Time Investing for 20-Somethings**," tailored for a specific audience and their pain points. The target audience is directly called out in the title of the video, leaving no doubt who this is for and what it contains. The results were astounding, with a view-through rate (VTR) of 75%, compared to more general videos such as "Lessons on Life Insurance" that performed at only 25% VTR.

Video content, when personalized for the right target audience, **increases stickiness and keeps visitors engaged and on your content**, longer, plus builds trust and helps you stand out.



#### ADVISOR WEBSITES' SURVEY DATA:

# 44%

of our most successful customers told us they create personalized content for their target audience to generate new business online.



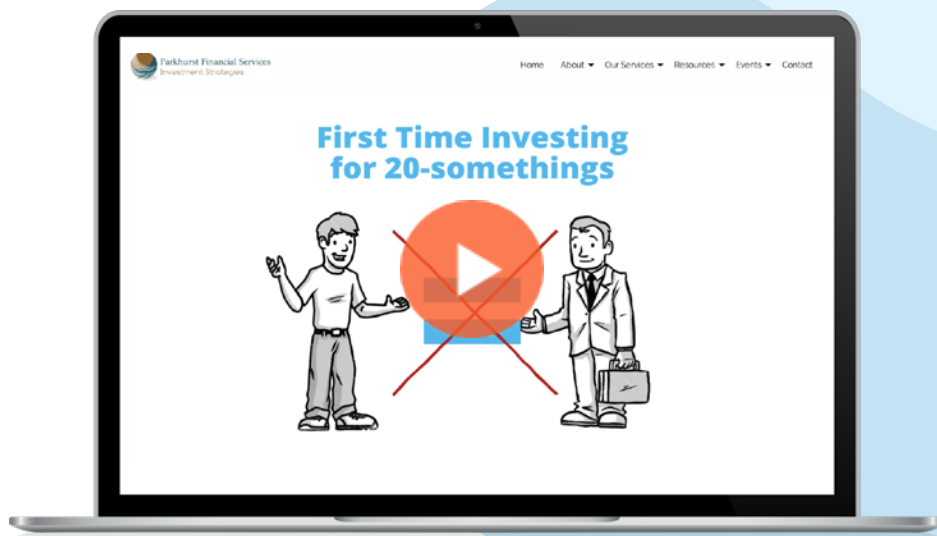
*Here's an example of how creating targeted messaging for a specific audience can work like magic...*

One of our Financial Advisor clients specializes in financial planning for teachers. So he has geared all his marketing messaging around addressing the very specific needs of that niche client. He uses a multi-pronged marketing approach including a targeted niche website, blog posts that address teachers' financial concerns, social media about those same topics, and custom whiteboard videos we created for him to address teacher's most frequent financial concerns. The result?

He got **9 new clients in one month!**

Teachers from all over the nation were finding him online with a simple, straightforward google search on "financial planning for teachers". That's how easy your marketing can become when you orient all your messaging to solve the specific problems faced by a very niche group of people.

- Jill Addison, Founder, **FA Client Machine**



## Three Simple Principles to get Greater ROI from your Content Marketing



### #1 Don't Waste Your Time on Generic Content

Creating content that is too broad puts you at risk of being drowned out by thousands of other financial advisor blogs online. Instead of casting your net too wide, zero in on what matters by creating tailored content that addresses your ideal client's needs and speaks their language.

.....



### #2 Stay Top of Mind with a Consistent Content Schedule

Produce content on a consistent basis to keep your business top of mind and leverage the right distribution channels like email and social media to get your content in front of the right eyes.

.....



### #3 Use Personalized Content to Gather Feedback

If you're not seeing results, this is an indication you need to dig deeper into what makes your clients stay up at night. Get to know your customers better!



Website visitors are

**5x more likely to convert**

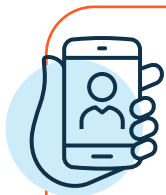
when presented with personalized content!<sup>21</sup>



## Advisors Are Creating Personal Connections on Social Media

57% of consumers will follow a brand to learn about new products or services<sup>22</sup>

Personalized and tailored content is great, but it isn't effective if you're unable to get it in front of your intended audience! Your social platforms offer up an opportunity for content distribution, lead generation and brand humanization. By distributing your content through social media channels, your audience reach expands and functions as a form of natural referrals when your audience reposts or shares your personalized content.



*Creating connection through brand humanization **builds trust and encourages engagement.**<sup>23</sup>*

Using social media to engage with your audience in a more authentic and human way will help you build stronger connections and drive engagement. With it, your brand **becomes more memorable** since your audience can connect in a more personal and human way; they begin to see you as more than just a logo.

Social media also provides an opportunity to gauge the accuracy of your targeted messaging since it allows for one to one communication. You can receive direct feedback and start conversations with your audience, which provides an authentic indication of how interested your prospects are in the content you've shared.

### What does it mean to 'humanize' your brand?

Trust is one of the key components of converting your audience online into new clients. Humanizing your brand, such as sharing the faces and personalities behind your business, helps prospects connect to your business and relate on a more personal level.

### The Top 5 Benefits of Personalization<sup>24</sup>



*Organizations that personalize content and tailor it for targeted audiences...*

- ✓ Increase visitor engagement (55%)
- ✓ Improve customer experience (55%)
- ✓ Improve brand perception (39%)
- ✓ Increase conversion rates (51%)
- ✓ Increase lead generation and customer acquisition (46%)

## Four Ways you can Create Personalized Digital Experiences Through Social Media



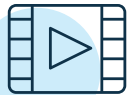
### #1 Sharing Personalized Content and Resources

Share a variety of content from your own curated pieces and other reputable sources you know your focused target market will find valuable.



### #3 Personalized Questionnaires

Encourage active engagement from your audience by creating personalized questionnaires. This is easier than ever since most social platforms offer in-app surveys.



### #2 Videos Tailored to Your Audience

Create short and personalized video clips (as easy as recording it on your smartphone) that address common questions or pain points your target audience frequently asks.



### #4 Start a Direct Conversation

Don't shy away from 1:1 communication! The best way to encourage engagement from your audience is to engage directly with them by actively commenting on posts or direct messaging prospects.



Many advisors are missing one of the most important ways to find new clients: using social media to build relationships where the client and the adviser actually have something in common—activities and hobbies they share, ideas they'll talk about, and places they like to visit. Social media creates a bridge and a bond that builds over time, because it is still a two-way interaction that connects people to people.

- Tina Powell, CEO, **C-Suite Social Media**

**csuite**  
social media



**ADVISOR WEBSITES' SURVEY DATA:**

**86%**  

said they found Facebook and LinkedIn to be the most effective social media channel in communicating with clients and prospects.



## Automation + Personalization Can Skyrocket Results

Personalization increases the efficiency of marketing spend by up to 30%<sup>25</sup>

The shift to technology adoption in financial services has created an incredible opportunity to leverage marketing tools to boost lead generation. Historically, advisors' marketing activities centered around in-person networking events in between advising clients. However, when met with a global pandemic in 2020, all in-person practices were brought to an abrupt halt, leaving advisors no choice but to adjust and adopt digital solutions quickly.

Automation is the silver lining of this quick change and many advisors realized they were underutilizing the tools available. Although automation goes hand in hand with all the digital marketing practices listed within this report, **the key benefit to leveraging automation is efficiency.**

Top advisors are using automation tools like email marketing, social media scheduling and content marketing solutions to give them a leg up on the competition. When used in conjunction with personalized and targeted content, automation is supercharging conversions and boosting ROI on marketing spend. In fact, **personalization can reduce acquisition costs by as much as 50%, lift revenues by 5% to 15%, and increase the efficiency of marketing spend by 10% to 30%.**<sup>26</sup>

For smaller firms lacking an in-house marketing department or big budgets to hire expensive agencies, automation has been the solution for easier asset creation and content distribution by advanced scheduling. Again, personalized and tailored content helps attract and build trust with prospects but isn't effective if you're unable to get it in front of your intended audience. Automation tools can ensure it does.

**Of those who've hired financial advisors, 47% said they are open to receiving personalized communications**<sup>27</sup> related to helping them achieve their financial goals, like emails tracking their progress toward saving or retirement. With this expectation, automated content tools can work wonders for the busy advisor who just doesn't have the time to craft and deploy email marketing from scratch.

Personalized automated marketing solutions help to streamline your efforts, saving you both time and money while enabling you to continually engage your audience, promote your services and grow your business. Automation alone can at times come off cold and inauthentic. The key to making automation successful? Ensure that your content and messaging are personalized and use the right channels to target your ideal client (aka that focused target market you built!).



*Personalized marketing automation is now helping advisors achieve their growth goals faster than ever before!*



If you receive content about something you care about, it doesn't feel like "marketing", and is likely to be consumed rather than ignored. Automation empowers us to do this, and this personalization at scale can drive significant growth for financial advisors - especially because we're so dependent on building relationships."

- Robert Sofia, CEO, **Snappy Kraken**





## Personalized Digital Experiences Drive Better Results

95% of companies that saw 3x ROI from their personalization efforts increased profitability the following year<sup>28</sup>

Financial advisor marketing has shifted to digital practices, and the pandemic has served as a catalyst for this change. Advisors who had not already adopted digital tools were forced to do so quickly, causing many to fall behind without the agility and resources to make these adjustments fast enough.

Because of this, **having a website and a strong digital presence is the new standard for all financial advisory firms**, leading to mass adoption from advisors around the world turning online to market and grow their business. This industry-wide adoption has led to a crowded space, saturated and cluttered with noise, challenging advisors to stand out, differentiate and attract the right audience.

The solution is to **provide personalized digital experiences to your focused target market.**

Common mistakes advisors make in this digital world are trying to fit in just to keep pace. By doing so, they're missing the mark on reaching the right audiences, seeing positive ROI, and ultimately wasting marketing efforts and resources.

Advisors that create personalized experiences for prospects during the five critical touchpoints of their digital marketing produced far better results than advisors who do not. So much so that **95% of companies that saw 3x ROI from their personalization efforts and increased profitability in the following year.**<sup>28</sup>



In today's digital era, cutting through the clutter and standing out against competitors isn't always easy, but it is critical. It requires knowing your audience and tailoring content to address their unique needs. In fact, more than half of companies that incorporate personalization into their content and websites report a lift of 10 percent or greater across their marketing goals, resulting in both improved conversion rates and customer engagement. But where do you begin?

Our latest report not only offers insights into why personalization is key, but it provides key steps for creating and executing a successful strategy. With proven marketing approaches and in-depth research, this report equips financial advisors with the tools and resources they need to better target the right audience, allowing them to focus more on what they do best – serving the financial needs of their customers.

- Graham Turner, CEO, **Advisor Websites**



After Surveying our most Successful Customers and Gathering the most Current and Compelling Stats and Industry Benchmarks Available, we Uncovered Five Key Findings:

#1

Advisors are creating a strong foundation for their digital marketing and **narrowing down their target market to drive growth**. The most successful advisors are growing their business faster by focusing on their target audience and taking the time to understand their unique needs and pains.

.....

#2

Generic websites don't produce results and are creating negative user experiences for advisors' website visitors. **Advisors are strategically personalizing their websites to speak directly to their focused target market**, using their time and resources wisely which positively impacts conversion rates.

.....

#3

Content marketing drives the best results when it's personalized. Audiences are overloaded with digital content, and unless **advisors are creating content that's targeted and relevant to their needs**, prospects will likely overlook their business altogether.

#4

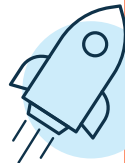
**Successful advisors are using social media to drive more traffic and conversions to their websites**. By distributing their personalized content on their social media accounts, advisors are extending their reach farther than ever before and quickly building trust with their audience by humanizing their brand.

.....

#5

Advisors are leveraging marketing automation in conjunction with personalized digital marketing to produce incredible results. Once unlocking the secret to success in personalization and targeted marketing, **automation is giving advisors the leg up, boosting results with less money and time than ever before**.

*It's time to make things personal and fuel growth with personalized marketing.*



# Resources

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