



**The New Era of Marketing**

**2026**

# **Marketing Guide**

for Financial Advisors



# Your Marketing Roadmap for Winning in the Age of AI

**The financial advisory landscape isn't just evolving – it's being revolutionized by AI.**

In 2026, prospects aren't starting their advisor search with Google anymore. They're asking AI platforms (like ChatGPT, Perplexity, and Gemini) for recommendations. AI tools analyze advisor websites, summarize reviews, and compare advisors before ever picking up the phone.

## Why This Guide, Why Now?

While human trust has become the ultimate differentiator, the best advisors are also using AI to win back their time. They've automated the mundane (content creation, scheduling, follow-ups) to focus on the meaningful (client conversations, strategic planning, relationship building).

**“What do you want from your marketing in 2026?”**

- **Get Found Online** – Appear in AI search results, build trust before the first meeting, and leverage testimonials the right way
- **Stay Active & Visible on Social Media** – Maintain a consistent presence without the time drain
- **Communicate Consistently With Content People Actually Read** – Automate communication that feels personal and drives engagement
- **Create Meaningful Connection: Your Human Advantage** – Use video and events to differentiate myself and my business

Which means...

**The strategies in this guide are designed to keep you visible and connected.**

I'm looking for a financial advisor who...

 GENERATE

**15%**

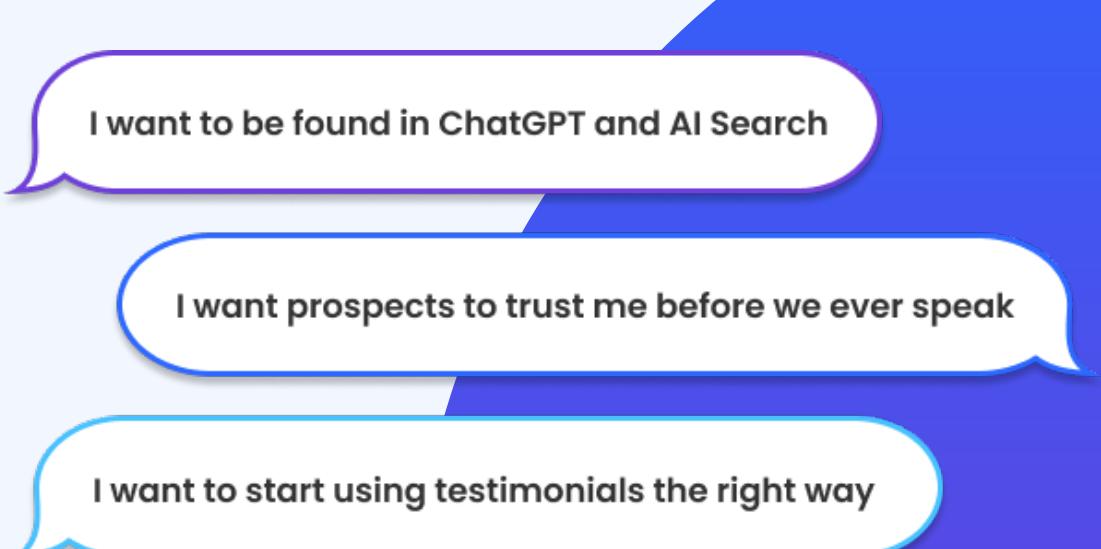
of advisors already **reported receiving leads from AI search\***

\*Future Proof

SECTION 1

# Get Found Online

How to **appear in AI search results and convert that visibility into genuine client confidence**



I want to be found in ChatGPT and AI Search

I want prospects to trust me before we ever speak

I want to start using testimonials the right way

# AI Search Has Changed Everything

Traditional SEO is no longer enough. AI platforms now bypass traditional search results, giving prospects instant, direct answers instead of lists of links.

Prospects aren't searching "financial advisor Chicago" anymore. They're asking specific questions, such as "Which financial advisor near me specializes in tech executive compensation planning?" AI tools answer these questions by analyzing depth, recency, and clarity of your content across your online presence.

AI prioritizes who to show in search results based on:

1. **Reviews** → Are others recommending your business?
2. **Reputation** → Are you seen as trustworthy and authoritative enough for AI tools to cite your content or your firm?
3. **Content Formatting & Recency** → Is your content set up to precisely answer the questions your audience is asking? Is it fresh?

## 1 Reviews: Your AI Visibility Accelerator

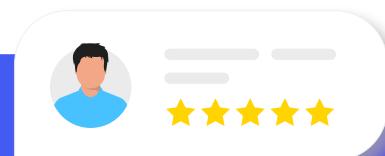
Reviews aren't just social proof anymore – they're a fundamental ranking signal.

### How Reviews Impact AI Search Discovery

When AI platforms search for financial advisors to recommend, they analyze review signals across multiple platforms. Advisors with strong review profiles appear in AI results; those without remain invisible.

AI tools evaluate 3 things when evaluating reviews:

1. **Recency:** A business with 50 reviews from the past year outranks one with 100 reviews from 3+ years ago. AI prioritizes active businesses with recent client feedback. Aim for 1-2 new reviews per month.
2. **Location:** Having reviews on multiple platforms creates stronger signals than concentrating reviews in one place. Consider collecting reviews with:
  - Google Business Profile – This is visible for local search and AI recommendations.
  - Testimonial iQ – Industry-specific software designed for financial advisors to compliantly collect and share reviews. It can automatically request permission from clients to republish their reviews.



74%

of prospects check at least 2 review sites before making decisions\*

\*BrightLocal

**3. Specificity:** Generic reviews (“Great advisor!”) provide minimal value. Reviews with specific details give AI context to recommend you for relevant searches. Encourage specificity without leading clients toward particular language. In your review request, include guiding questions:

- “What specific challenge were you facing when we started working together?”
- “How would you describe the communication and support you’ve received?”
- “Would you recommend our firm to others in [City Name] looking for a financial advisor?”

## The Four-Step Review Request System

Building a review generation system doesn’t require complicated systems – these simple steps ensure you’re consistently collecting testimonials.

### Step 1: Launch the Broad Email Campaign

Launch a 3-email series to your entire client base explaining that you’re committed to transparency and inviting all clients to share honest experiences. Include a direct link to your preferred review platform and reassurance that you value all feedback.

**Reminder:** Once a client leaves a review, remove them from automated review request emails.



Download these email templates to get started. Be sure to add any disclosures required by your firm.

[Download templates >](#)

### Step 2: Schedule Post-Meeting Requests

After every client meeting, send a follow-up email thanking them for their time and include a request for a review.

Schedule an email or text requesting a review 3 days after an in-person meeting.

#### Keep it personal:

“Hi [Name], it was great meeting with you this week to discuss [topic]. If you have a moment, I’d really appreciate your honest feedback: [review link].”

New Message

– ↗ X

We'd love to hear your feedback!

We'd greatly appreciate it if you could take 2-3 minutes of your time to share your feedback in this short survey.

Send

A U :

trash

**Only 10%**  
of SEC-registered firms **leverage**  
**testimonials on their website.**

This creates a massive opportunity for differentiation.\*

\*Kitces

### Step 3: Create QR Code Review Reminders

Display a QR code prominently on your desk or in your reception area. Mention it verbally at the end of meetings: “We’d appreciate you sharing your experience – there’s a QR code on my desk.”



Easily generate a QR code with Canva’s free tool.

[Generate QR code >](#)

### Step 4: Add Review Link to Email Signature

Add a review link to your email signature. Every client email becomes an opportunity for a review.

**Make sure to thank the client for their review via email or text message:**

“[Client Name],

Thank you so much for leaving a review! It’s a pleasure working with you, and I appreciate you taking the time to share your experience. If you ever have questions or know someone who could benefit from our services, I’m always here to help.

[Your Signature]”

*Replies to the review publicly is not always compliant (it is deemed as accepting or adopting the review), so send a personal thank you message instead.*

## Managing Negative Reviews Proactively

Most negative reviews don’t come from dissatisfied long-term clients. They typically stem from clients who felt ignored, communication breakdowns during onboarding, or service delays.

Prevention strategies:

- Handle “no-fit” prospects with care; refer those who don’t meet minimums to another advisor
- [Implement a repeatable client onboarding experience](#) to set expectations on response times, fees, and service levels
- Create a “service recovery” protocol when something goes wrong

When you do receive a negative review, respond professionally:

*“Thank you for sharing your experience, [Name]. I’m sorry we didn’t meet your expectations during [situation]. We pride ourselves on clear communication, and I’d welcome the opportunity to discuss your concerns directly. Please reach out to me at [contact]. Your feedback helps us improve.”*

A thoughtful response to criticism can actually strengthen your reputation more than having no negative reviews at all.

## Where to Display Reviews

- **Your Website** – Create a dedicated testimonials page or embed reviews directly on your site
- **Videos** – Ask clients to record a brief video sharing their experience
- **Client Case Studies** – Cover the problem, solution, and outcome in the client's words
- **Social Media** – Amplify your testimonials' reach, with the required careful handling:

### ✓ Do

- Share a screenshot of a review with a caption like: "Grateful for feedback like this. See what other clients are saying: [link to full reviews page]"
- Post a video testimonial with compliance disclosures in the caption or video description
- Create a graphic that says "Read our client reviews" with a link

### ✗ Don't

- Share only positive reviews without linking to all reviews
- Edit or alter client testimonials
- Share reviews without required disclosures

## Compliance Quick Check

- ✓ Never incentivize reviews – No gifts, discounts, or payments
- ✓ Don't cherry-pick or edit – Use full reviews or clearly mark excerpts
- ✓ Get written permission – Have clients sign permission to use testimonials in marketing
- ✓ Provide balanced access – All clients must have equal opportunity to provide reviews
- ✓ Display all reviews – Don't hide negative feedback; use third-party platforms that show everything

Real life financial planning for real people like you.

★★★★★

"...I highly recommend this team to corporate retirement benefit officers, small business owners, and people intimidated about future retirement."

--Brian W.

★★★★★

"...Their guidance and methodology have kept our financial goals headed in the right direction no matter the market conditions."

--Justin H.

★★★★★

"Our family stands on solid financial footing because of Fiduciary Financial Partners (FFP)..."

--Adam W.

★★★★★

"If you want personalized hands-on planning, then Fiduciary Financial Partners is the place you've been looking for..."

-- Paul F.

[READ MORE](#)

[www.fiduciaryfinancialpartners.com](http://www.fiduciaryfinancialpartners.com)

"Everyone is very welcoming, informative, and helpful from the moment we step in the door until we leave. I feel they have our best interest at heart when making recommendations with our investments and finances. Highly recommend!"

- Gary S.

This testimonial was provided by "Gary S.", a current client of Avaii. No compensation was provided for this testimonial. This client's experience may not be indicative of all client experiences.

[To view all reviews, you can click here.](#)

## 2 Reputation: Building Authority That AI Recognizes

When AI tools gather information to answer queries, they look for signals of authority and trustworthiness. This means being cited or featured in reputable publications online makes you far more likely to appear in AI-generated recommendations.

### Showcase your authority online:

- Feature logos from publications or websites where you've been quoted
- Link to articles you've contributed to
- Share podcast appearances or interview links
- Reference your media features in blog posts and social updates
- Create a dedicated "Media & Press" or "In the News" page
- Include "As Seen In" logos on your homepage



Use services like [HARO](#) (Help A Reporter Out) to connect with journalists seeking expert sources. Responding to relevant queries can lead to mentions in major publications, thereby expanding your visibility and signaling authority.

### Niche expertise amplifies authority:

When you specialize in serving specific groups – tech executives, physicians, divorcees, business owners – you become more discoverable and more compelling in AI results.

AI tools prioritize specialists over generalists because they can confidently recommend you for specific queries.

### Content depth builds authority:

Create comprehensive content that thoroughly covers important subjects. A 2,000-word guide titled "Complete Guide to Stock Options for Tech Employees in 2026" will outperform ten 200-word blog posts in AI search results.

AI tools reward depth, structure, and expertise when determining which sources to cite.



**Only 8%**  
of advisors **actively**  
**pursue niche marketing**  
**focused on occupation**  
**or life transition.\***

\*[AcquireUp](#)

See Wizdom as an example.

### 3 Content Formatting & Recency: Structure & Update for AI Discovery

AI reads and interprets websites differently than traditional search engines. While Google focuses on keywords and links, AI answer engines look for content that directly answers user questions in a conversational format.

Your content needs to be structured like a helpful conversation, not traditional marketing copy.

#### **The Q&A format advantage:**

When someone searches “Can I roll over my 401(k) without penalties?” AI tools look for content that explicitly addresses this question.

Instead of burying rollover information in a long paragraph about retirement planning, structure it like this:

**Q: Can I roll over my 401(k) to an IRA without penalties?**

A: Yes, you can roll over your 401(k) to a traditional IRA without paying taxes or penalties if the transfer is done correctly and meets IRS rules.

#### **Update content regularly:**

You don't need to rewrite your entire website monthly. Focus on high-value updates:

- **Add date stamps to titles:**
  - “Retirement Planning Strategies” → “Retirement Planning Strategies for 2026”
  - “Tax Planning Guide” → “Q1 2026 Tax Planning Guide”
- **Refresh evergreen content:**
  - Review your top-performing pages quarterly and add fresh sections, updated statistics, or new examples.
- **Publish new content consistently:**
  - AI tools favor websites with regular publishing schedules. Set a minimum cadence:
    - 2 blog posts per month
    - Quarterly updates to key service pages

#### **Build comprehensive FAQ pages:**

Create dedicated FAQ pages for your key service areas. Answer the questions prospects actually ask – even uncomfortable ones about fees, asset minimums, and what makes you different.

For blog posts, structure titles as questions:

“Top 5 Things You Should Know About Social Security”

“When Should You Take Social Security?”

The question format immediately signals to AI that you're providing the direct answer searchers want.

## Schema markup – The technical enhancement:

Once your content is written in Q&A format, amplify its discoverability with schema markup, which is simply special code on the backend that tells AI tools exactly what type of content you're providing.

When you add FAQ with schema markup to your questions and answers, you're essentially telling Google and AI tools: "This is a frequently asked question with a direct answer." This makes your content eligible to appear in featured snippets and voice search results.



You don't have to be a coder to add this in. **FMG automatically adds schema markup when customers create FAQ pages** through our platform.

[Learn more >](#)

## Maintain consistent naming across directories:

Your firm's name, address, and phone number must appear exactly the same across every platform:

- Google Business Profile
- Social media pages
- Business directories (Yelp, AdvisorFinder, CFP Board listings, etc.)
- Your website

Small differences confuse AI systems. Don't use "Russell Investments, Ste 201" in one place and "Russell Investments LLC – Suite 201" in another. These discrepancies prevent AI from recognizing these as the same business, costing you visibility.



If you're part of a larger firm or enterprise, ensure you have your own dedicated page with your name, bio, and expertise. AI tools look for individual advisor profiles, not just firm pages.



**FMG puts you in control of how your business appears online**, from addresses and phone numbers to business descriptions and photos, via the Local Search feature. This ensures your name, address, and phone number are consistent across 60+ directories (including Google).

# AI-Powered Content Creation That Doesn't Sound Robotic

AI is your content creation accelerator – but only if you use it right. Use AI to draft content, then humanize it.

Start by including four critical pieces of information:

1

## Who You Are

Share your role and firm name, your tone of voice, and anything else that helps the AI understand your perspective. For example:

*"I'm a financial advisor who works primarily with Gen X professionals navigating mid-career financial decisions. My tone is friendly, professional, and confident."*

2

## The Goal of the Content

What do you want the content to accomplish? Be specific about the format and outcome. For example:

*"I need a blog post that explains the benefits of a backdoor Roth IRA and encourages readers to schedule a consultation."*

3

## Your Target Audience

Define who the content is for – age, profession, financial situation, geographic location, and even pain points. For example:

*"Write this for a 40-something tech professional in Austin, Texas, who is trying to minimize taxes and invest more efficiently."*

4

## Tone and Writing Style

Include examples of your past writing or point the AI to an existing blog post you've written to help it match your tone and style.

*"Use this conversational, approachable style from my previous newsletter: 'Tax season doesn't have to feel like a root canal. Here's the thing most people don't realize...'"*

## Always humanize AI output

Add personal anecdotes or client stories (anonymized). Inject your specific point of view or opinion. Remove common AI phrases like “In conclusion” or “It’s important to note.” Read it aloud – if it doesn’t sound like you, revise it.



Most AI tools allow you to enter custom personalization via settings to teach it your unique voice and style. The more context you provide upfront, the less editing you'll need later.

## Additional Resources

### CHECKLIST

Answer Engine Optimization (AEO): Impact & Best Practices

[Download >](#)

### WORKSHOP

The Exact AI Framework Driving Advisor Growth

[Watch Now >](#)

### GUIDE

The AI Edge: Smarter Marketing and Deeper Client Connections

[Download >](#)

### GUIDE

Build a Compliant Testimonial System That Grows Your Practice

[Download >](#)

“

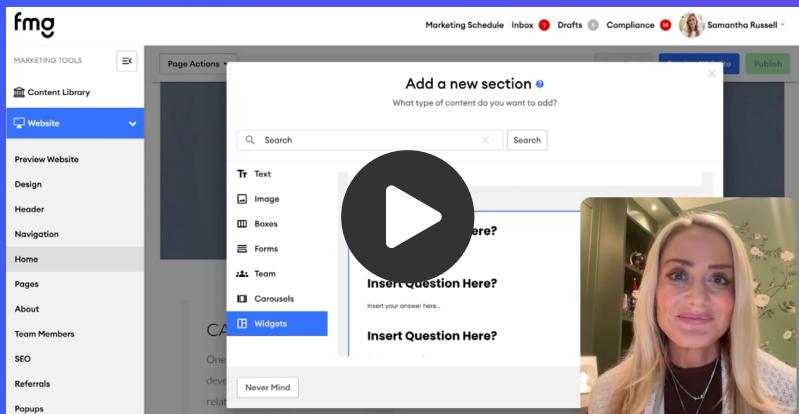
I have a marketing company that provides content, but it would take me so much time to go through the process of acquiring and using it. What you guys do has been a game-changer, and with my daughter's help in personalizing everything, plus the new AI tools you released, everything is so timely and quick.



**Tim Carlson**  
Integrated Financial Partners

# THIS IS **fmg**

How FMG's tools specifically help you **get found online and build trust immediately**:



## Action Items:

### Quick Wins (1-3 days)

- Add 3-5 of your most frequently asked questions to the bottom of your home page
- Claim your Google My Business profile if you haven't already
- Select one timely topic and create a blog with Q&A headings

#### How FMG Helps:

- FMG websites include FAQ page templates with schema markup built in
- AI tool (Muse) converts existing content into Q&A format
- Content Library provides various content types that can be repurposed into blogs or other formats

### Game Changers (1-4 weeks)

- Update your website pages monthly with fresh content (set a reminder!)
- Add a niche-specific content page to your site
- Review all local listings to ensure your business information is accurate and consistent everywhere it appears

#### How FMG Helps:

- Built-in AI tool (Muse) simplifies content updates while ensuring compliance
- 8 pre-built niche pages help you quickly expand relevant website content
- Local Search features automatically sync your name, address, and phone number across 60+ directories

### Advanced Moves (1-3 months)

- Build a review generation process with monthly goals
- Choose 4 core topics and publish thought leadership blogs that position you as an expert in your niche
- Host an educational virtual event and repurpose the content across your marketing

#### How FMG Helps:

- Premium Websites with customizable templates and high-impact content
- Content Library aligns with timely and evergreen topics (tax season, market events, etc.)
- Built-in Event tools make it easy to host virtual educational events and repurpose content across your marketing

**SECTION 2**

# Stay Active & Visible on Social Media

Leverage **AI for content creation** while **maintaining a human voice that builds real connections**



I want to be active on social media,  
but I don't know the best way to do it

I want to have actual conversations  
with my target clients on social media

I want to show up on social media but I don't  
have the time to post consistently

# Save Time on Social Media

You know social media matters. Your prospects are there. Your competitors are there. But between client meetings and actually managing portfolios, who has time to post and engage consistently?

AI has fundamentally changed how advisors can show up on social media – not by replacing your voice, but by amplifying it.

## The Six Pillars of Social Media Success

### 1 Nail Your LinkedIn Profile

Building a strong LinkedIn presence starts with your profile. Optimize every element to showcase your professional brand and expertise.

#### Profile Essentials:

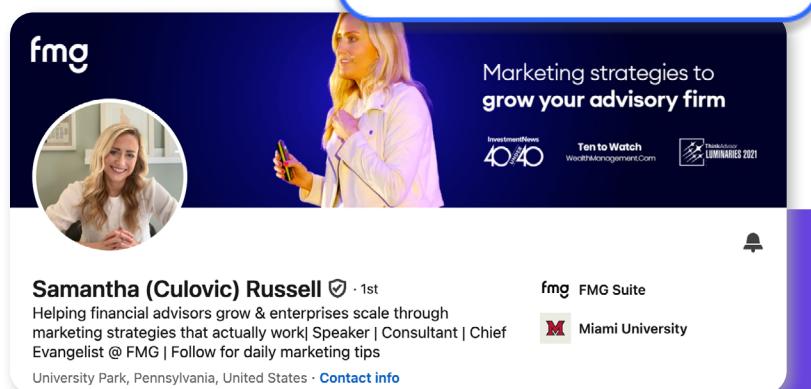
##### Visuals

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

##### Narrative

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

[linkedin.com/in/samantharussell/](https://www.linkedin.com/in/samantharussell/)



**Samantha (Culovic) Russell**  · 1st  
Helping financial advisors grow & enterprises scale through marketing strategies that actually work! Speaker | Consultant | Chief Evangelist @ FMG | Follow for daily marketing tips

University Park, Pennsylvania, United States · [Contact info](#)

**79%**

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

\*[Forbes](#)



## 2 AI Makes Social Content Creation Easier

Here's where AI becomes your secret weapon. Instead of staring at a blank screen, wondering what to post, AI helps you:

### Transform Ideas into Posts Faster

Use AI to generate initial content tailored to your expertise. Some ideas:

- Turn a client conversation into a LinkedIn post
- Convert an existing blog article into multiple social posts
  - Try a LinkedIn article highlighting 3 key takeaways or an Instagram carousel with visual statistics
- Generate commentary on industry news
- Create educational content that positions you as a thought leader

**The key:** Start with AI, then add your personality. AI gives you the structure; you make it authentic.



Muse is built specifically for financial professionals to use within FMG's platform, with **marketing best practices, compliance rules, and advisor-specific use cases in mind**. It eliminates manual research, formatting, and platform switching.

[Learn More >](#)

### What's the benefit of using FMG's Muse AI rather than using ChatGPT directly?

	Muse	AI Platforms
Voice & Tone	Pre-loaded advisor-specific voice options	Generic, general-purpose tone
Compliance	Built-in compliance filtering	No compliance safeguards
Content Generation	Real-time copy for emails, social posts, and blogs	Real-time copy generation
Workflow	Integrated directly into FMG platform	Requires switching between tools



**Write With AI**

### 3 Post Zero-Click Content

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

#### Content Types That Perform Best:

##### Personal insights

- Share lessons learned from your own financial journey
- Behind-the-scenes glimpses of your practice
- Your take on industry trends

##### Industry tips

- Quick wins investors can implement immediately
- Myth-busting common financial misconceptions
- Timely guidance (tax deadlines, benefit enrollment periods)

##### Professional achievements

- Client success stories (anonymized, compliant)
- Speaking engagements or media features
- Firm milestones and team updates

##### Visual content that stops the scroll

- Data charts and graphs
- Educational videos
- Before/after financial scenarios (compliant)
- Infographics breaking down complex concepts

### 4 Understand the Algorithm

#### Content types LinkedIn prioritizes

- Native content that keeps users on the platform (text posts, images with text, videos)
- Carousel and video formats that provide comprehensive information
- Quality comments over high-volume reactions

#### Content types Instagram prioritizes

- Reels, short-form video under 90 seconds
- Carousel posts with multiple images or graphics that encourage swiping/longer engagement time
- Stories with interactive elements like polls, questions, and quizzes

#### Engagement strategies

- Engage with content from clients and prospects you'd like to hear more from
- Follow creators who consistently generate high engagement
- Post during peak engagement times for your network (for example, Tuesday-Thursday, 7-9 am or 12-1 pm)

#### Engagement strategies

- Prioritize video content (**Reels reach -36% more users than carousels and 125% more than photo posts, on average\***)
- Use 3-5 relevant hashtags (Instagram now deprioritizes posts with 20+ hashtags)
- Respond to all comments within the first hour of posting to boost reach

\*[Teleprompter](#)



## 5 Follow the 80/20 Rule

### Engage with 4 posts for every 1 post you share

This is the most underutilized strategy in social media marketing. The algorithm rewards active community members, not just broadcasters.

#### How to engage meaningfully:

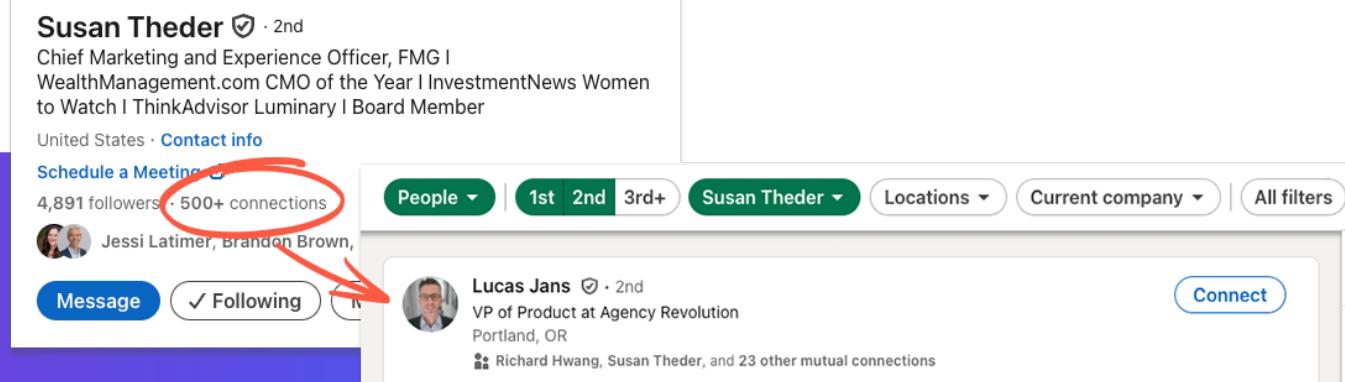
- Craft thoughtful, substantive comments that add value (3+ sentences)
- Ask open-ended questions that invite discussion
- Respond to every comment on your posts within 24 hours
- Share insights, ask for perspectives, and create two-way conversations

 Spend 10 minutes each morning engaging with 4-5 posts from your network before you post anything. This “primes” the algorithm to show your content to more people when you do post.

## 6 Find Meaningful Connections

### Move beyond passive networking:

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



Susan Theder  · 2nd  
Chief Marketing and Experience Officer, FMG I  
WealthManagement.com CMO of the Year | InvestmentNews Women to Watch | ThinkAdvisor Luminary | Board Member  
United States · [Contact info](#)  
[Schedule a Meeting](#)   
4,891 followers · 500+ connections   
 Jessi Latimer, Brandon Brown  
[Message](#)   

Lucas Jans  · 2nd  
VP of Product at Agency Revolution  
Portland, OR  
 Richard Hwang, Susan Theder, and 23 other mutual connections

**LinkedIn is the 2nd  
most cited domain across AI Platforms\***

\*Semrush

# The 2026 Consistency Framework

Consistency beats perfection. Here's a realistic posting cadence for busy advisors:

## Minimum Viable Presence:

- 3 posts per week on LinkedIn
- Engage with 4-5 posts daily (10 minutes)
- Respond to all comments on your posts

## Growth Mode:

- 4-5 posts per week on LinkedIn
- 1-2 posts per week on Instagram or Facebook
- Daily engagement (15 minutes)
- Monthly recording session to capture short-form video content

## Advanced Strategy:

- Daily LinkedIn posts
- Multi-platform presence (LinkedIn, Instagram, YouTube)
- Video content 2-3x per week
- Active participation in LinkedIn groups or conversations



**Remember:** Posting inconsistently (3 posts one week, nothing for two weeks) hurts you more than posting less frequently but consistently.

## Additional Resources

### CHECKLIST

Social Media Engagement

[Download >](#)

### WORKSHOP

Exact Steps I Took to Grow My LinkedIn Followers to 40K

[Watch Now >](#)

### BLOG

LinkedIn Basics

[Read Now >](#)

### BLOG

Getting Started on Instagram

[Read Now >](#)

“

Because of our partnership with FMG's Do It For Me program, the engagement with our content has just about doubled! We receive compliments from clients and prospects on a weekly basis regarding the FMG content that our team distributes on our behalf. We've saved time and money, and the results are great! I would highly recommend it.

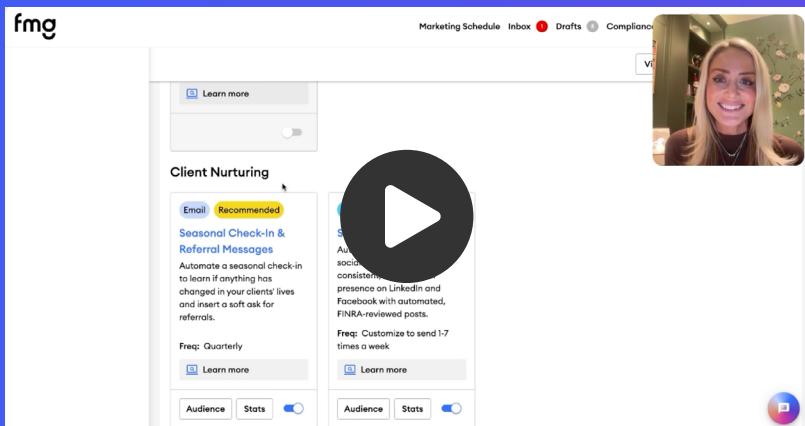


**Doug Howes**

Sapphire Wealth Management

# THIS IS **fmg**

How FMG's tools work together to **create an always-on social presence:**



## Action Items:

### Quick Wins

(1-3 days)

- Review and optimize your LinkedIn profile for clarity, credibility, and relevance
- Publish 1-2 posts this week to establish early momentum
- Block 10 minutes each morning this week to engage with others' posts

### How FMG Helps:

- A fully built Social Media section in the Content Library with Zero-Click Content ready to publish
- Social Sequences enable consistent posting across related topics—so you stay visible without added effort

### Game Changers

(1-4 weeks)

- Establish a weekly routine to batch and schedule social posts in advance
- Repurpose blogs and other long-form content into platform-ready social posts
- Use advanced filtering to engage with 20 new prospects' posts each week

### How FMG Helps:

- Social Scheduler enables creation and scheduling of 30+ days of content in a single session
- AI tool (Muse) helps create custom posts, with beautifully branded visuals via Canva integration
- Mobile app supports on-the-go posting and engagement tracking

### Advanced Moves

(1-3 months)

- Build a multi-platform presence (LinkedIn + one other platform)
- Incorporate video content 2-3x per week
- Launch a thought leadership series (weekly tips, monthly deep dives)

### How FMG Helps:

- Monthly Instagram-specific content drops with guidance for carousels, reels, and feed posts
- Do It For Me program fully outsources social media execution, combining consistent posting with timely content when news breaks

# Communicate Consistently With Content People Actually Read

Build an **email strategy** that can **run on autopilot** without losing the personal touch that keeps clients engaged



I want emails people actually read

I want to communicate with clients & prospects consistently with relevant and valuable info – but I don't have time

I want to respond quickly when breaking news comes out

# Craft a Communication Strategy that Engages and Converts

Email remains your most vital channel for client outreach, but the game has changed. In 2026, the advisors who connect are those who combine strategic email marketing with AI-powered personalization and smart automation – creating communications that feel personal at scale.

## The Foundation: Types of Emails That Drive Results

Build your communication strategy around these essential email types:

### Email Newsletter: Your Regular Touchpoint

Weekly or monthly updates keep you top of mind with firm and industry news. The key is consistency – pick a schedule and stick to it.

### Automated Drip Series: Set It and Forget It

From prospecting to new client onboarding, drip emails nurture relationships automatically. These sequences provide ongoing education and engagement without requiring your daily attention.

### Timely Content: When Markets Move

Market volatility and breaking news create anxiety. Strategic communications during these moments offer reassuring context and remind clients to stay focused on long-term goals. This is where speed matters.

### Personalized Lifestyle Content: Beyond Finance

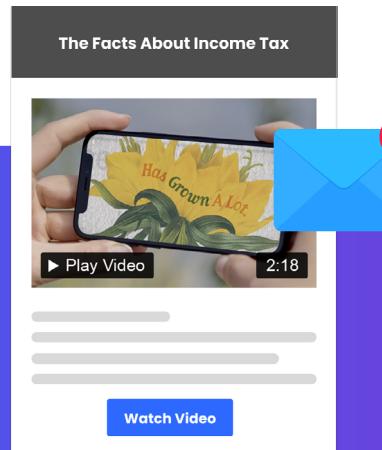
Track client hobbies in your CRM – wine, cooking, golf, pickleball – and send relevant content that shows you see them as whole people, not just portfolios.



When you sync your CRM with FMG, the tags also sync, **making it easy to market specifically to these niches.**

### Birthdays and Anniversaries: The Simple Wins

Don't overlook celebratory wishes and significant milestones. These simple touches deepen relationships and keep you memorable.



## AI-Enhanced Email Best Practices

This is where 2026 gets interesting. AI tools can help you create personalized content at scale without losing the human touch.

### AI can help you:

- Generate first drafts based on your writing style
- Adapt a single message for different audience segments
- Create subject line variations
- Develop content calendars with timely topics

The key is treating AI as a drafting assistant, not a replacement for your voice. Follow the prompting strategies in Section 1.

## Texting: Your Communication Accelerator

### When to Use Text Messaging:

#### Appointment Management:

- Confirm meetings 24 hours in advance
- Reduce no-shows with timely reminders
- Provide easy rescheduling options with calendar links

#### Rapid Document Completion:

- Text reminders get documents returned in 5 minutes (MyRepChat Internal Data, 2024)
- Follow up on pending paperwork quickly
- Send secure links to e-signature platforms

#### Instant Communication:

- Time-sensitive updates that can't wait for email
- Quick check-ins after major life events
- Annual review scheduling with immediate booking links

#### Compliance-Friendly:

- Modern texting platforms maintain required records
- Adhere to financial industry regulations
- Maintain professional communication standards

The simpler and faster the interaction needs to be, the more appropriate texting becomes.



**10X**

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

Don't leave this powerful  
channel untapped.

\*MailMunch

## Additional Resources

### CHECKLIST

Communication Strategy

[Download >](#)

### WORKSHOP

Communications Workshop

[Watch Now >](#)

### BLOG

10 Proven Text Message Templates for Financial Advisors That Drive Results

[Read Now >](#)

### BLOG

3 Tips to Building an Effective Communication Strategy

[Read Now >](#)

“

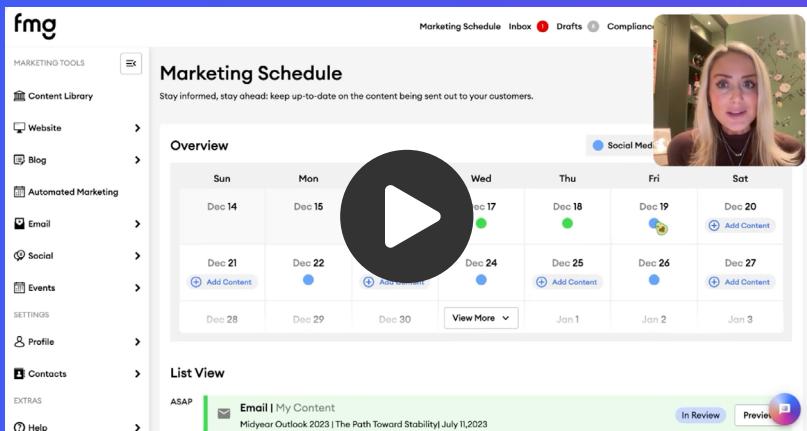
I get thank you calls on the birthday cards sent automatically through my FMG Persona. I've had clients reach out with questions and send notes of appreciation from the monthly newsletters. I don't have time to do the personalized outreach I need to be doing. FMG's marketing team makes me look great!



**Mo Rowe**  
First Financial Group

# THIS IS **fmg**

FMG's communication tools work together to **create** an always-on email marketing system:



## Action Items:

### Quick Wins (1-3 days)

- Send a monthly newsletter or market update to stay top of mind with clients and prospects
- Set up automated birthday and anniversary emails
- Update your email signature and branding for a clean, polished, and consistent look

#### How FMG Helps:

- Pre-built templates make it easy to launch newsletters, updates, and automated emails quickly
- Celebration automations are fully built and ready to activate – so you set them up once and they run automatically
- Email signature templates ensure consistent branding and contact information across all communications

### Game Changers (1-4 weeks)

- Segment your email list to enable targeted messaging (at a minimum: clients and prospects)
- Build a prospect nurture sequence to stay top of mind over time
- Set up a compliant texting workflow for appointment reminders

#### How FMG Helps:

- Audience segmentation tools support targeted messaging by client type
- Pre-written nurture and drip campaigns can be customized and scheduled immediately
- MyRepChat texting platform integrates with calendar systems to automate compliant appointment reminders

### Advanced Moves (1-3 months)

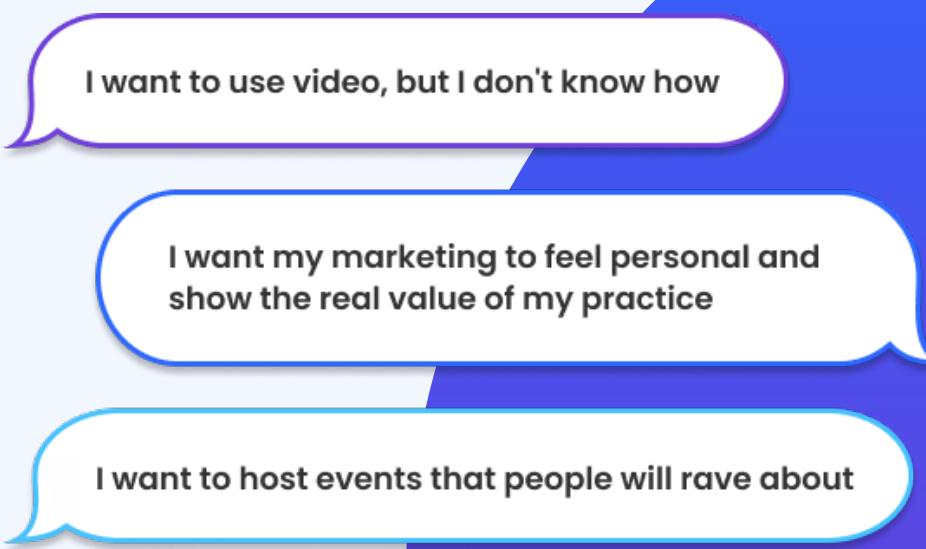
- Create a monthly content calendar tied to key moments (tax season, benefits enrollment, market events)
- Build lifestyle-based content series tailored to different client interests (travel, business owners, retirees, etc.)
- Expand beyond reminders with a proactive texting strategy

#### How FMG Helps:

- Do-It-For-Me program delivers a monthly content calendar with a guided walkthrough video—and a dedicated concierge to execute everything for you
- Content Library includes lifestyle-based topics ready to personalize and send, helping your outreach feel relevant and authentic

# Create Meaningful Connection: Your Human Advantage

Leverage video and events as your true differentiator, **creating memorable experiences that AI can't replicate**



I want to use video, but I don't know how

I want my marketing to feel personal and show the real value of my practice

I want to host events that people will rave about

# The Human Advantage in an AI Era

AI can draft your emails, optimize your website, and even help prospects find you online. But it can't replace the emotional connection that happens when someone sees your face, hears your story, or meets you at an event.

As AI transforms how you work, the **human touch has never been more valuable**. Video and events aren't just marketing tactics – they're trust accelerators that turn curious prospects into committed clients and builds lasting loyalty.

## Why Video Matters More Than Ever

Video isn't just about information delivery – it's about creating an emotional connection before you ever meet face-to-face. When prospects can see your personality, hear your voice, and watch how you explain complex topics simply, they arrive at that first meeting already feeling like they know you.

**79%**  
of consumers  
would rather  
watch a video  
about a product  
than read about it\*

### The Three Videos Every Advisor Should Record

You don't need a film crew or expensive equipment. Your smartphone and a quiet room are enough. Focus on creating these three essential videos:

#### 1. Your Founder's Story (2-3 minutes)

- Share your personal journey and what drives you
- Explain why you became a financial advisor
- Highlight what makes your approach unique

→ **Purpose:** Builds emotional connection and demonstrates authenticity

#### 2. Client Experience Walkthrough (1-2 minutes)

- Explain what prospects can expect when working with you
- Walk through your process from discovery meeting to ongoing partnership
- Focus on addressing client concerns, not listing services

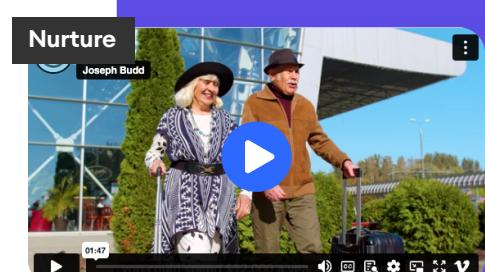
→ **Purpose:** Demystifies your process and reduces prospect anxiety

#### 3. Nurture/Reminder Video (30-60 seconds)

- Keep your tone light and approachable
- Incorporate humor or unexpected approaches
- Subtly remind prospects you're available to help

→ **Purpose:** Stays top-of-mind without being salesy

### Video Examples:



\*Animoto

## Where to Use Your Videos

Once you've recorded your videos, maximize their impact by featuring them across your marketing:

### On Your Website:

- Add your Founder's Story to your homepage
- Include individual "Meet the Team" videos on your About page
- Create a video blog section with financial planning tips

### In Email Communications:

- Incorporate video into regular newsletters
- Send personalized video messages for client birthdays or check-ins
- Add video synopses with your commentary on timely market updates

### On Social Media:

- Share quick financial tips (30-60 seconds)
- Post timely market insights during volatility
- Don't forget personal videos – events, travel updates, family/pets  
**(these often get the highest engagement and increase social media engagement by 400%)\*\***



Upload, host, generate thumbnails – **FMG makes it easy to embed videos across your website, email, and social media** (all while routing through your regular compliance process).

**80%**

**rise in conversion rates** with a Founder's Story on your homepage\*

**300%**

**increase in click-through rates** incorporating video into newsletters\*

## Additional Resources

### CHECKLIST

Video Best Practices

[Download >](#)

### WORKSHOP

Video Marketing Made Easy

[Watch Now >](#)

### BLOG

3, 2, 1, Action: The Power of Video Marketing

[Read Now >](#)

### BLOG

5 Steps to Get Started with Video Marketing for Financial Advisors

[Read Now >](#)

# Events: Your Secret Weapon for Differentiation

Events aren't just about providing information – they're about creating memorable experiences that attendees will want to share.

## Event Frequency and Planning

Start where you are and build momentum:

- **Initial Stage:** Host 2 events per year
- **Growth Stage:** Aim for quarterly events (4 per year)
- **Advanced Stage:** Add timely events on trending topics to your schedule

We recommend mixing virtual and in-person events to maximize reach and engagement.

## Virtual Webinars: Scalable Lead Generation

Educational webinars offer a high-ROI format that allows you to:

- Generate high-quality leads at scale
- Build brand awareness and establish authority
- Provide accessible, convenient content to a wide audience
- Partner with Subject Matter Experts (SMEs) or Centers of Influence (COIs) for joint presentations

### Webinar Success Strategies:

- Focus on educational content that solves real problems
- Add fun giveaways or prizes during the live event to encourage attendance
- Collaborate with complementary professionals (estate planning attorneys, tax professionals, real estate agents)
- Cut video snippets to use all year on social media

## In-Person Events: Building Lasting Relationships

Networking in person creates powerful opportunities to:

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



Try these event ideas that advisors are seeing real success with.

[Explore event ideas >](#)

## Optimize Your Event Planning with AI

- Brainstorm unique event ideas for your target audience
- Draft personalized email invitations and social posts to encourage attendance
- Create an event schedule to help it run smoothly day-of



**FMG makes hosting an event easy with our Event Builder.** Create your event; promote it with emails, social posts, and print invites; and track RSVPs in one place. Host a custom event or grab a pre-built Event Kit with webinar deck, script, and follow-up materials included.

## Additional Resources

### CHECKLIST

Event Best Practices

[Download >](#)

### WORKSHOP

Make Your Event an Easy Yes

[Watch Now >](#)

### WORKSHOP

How to Host Successful Events that Generate Quality Leads

[Watch Now >](#)

### BLOG

How to Host Successful Events that Generate Quality Leads

[Read Now >](#)

“

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



**Kevin Blondina**  
B&D Group

# Relationship-Based Marketing Checklist

The beauty of modern marketing tools is that personal touches can scale. Here's how to make every client feel valued:

## Use Your CRM Strategically:

- Note client hobbies and interests during meetings
- Set reminders for birthdays, anniversaries, and significant milestones
- Track lifestyle preferences (wine, golf, cooking, travel)
- Segment clients by interests for targeted content

## Client Appreciation Workflows:

- Create your own birthday and anniversary emails, adding personal video messages
- Send personalized lifestyle content based on tracked interests
- Include personal notes in annual review scheduling emails
- Follow up quickly after meetings with recap videos

## Gifting and Events:

- Host seasonal appreciation events
- Send thoughtful gifts tied to client interests
- Create VIP experiences for top referral sources
- Invite clients' adult children to educational workshops

## Personal Touches That Scale:

- Record 30-second video check-ins for clients during market volatility
- Send handwritten notes after major life events
- Share articles related to clients' hobbies with personal notes
- Feature client success stories (with permission) in newsletters



**Download the Client Onboarding Guide** to make every client feel like your only client – from the moment they join you.

[Download Guide >](#)

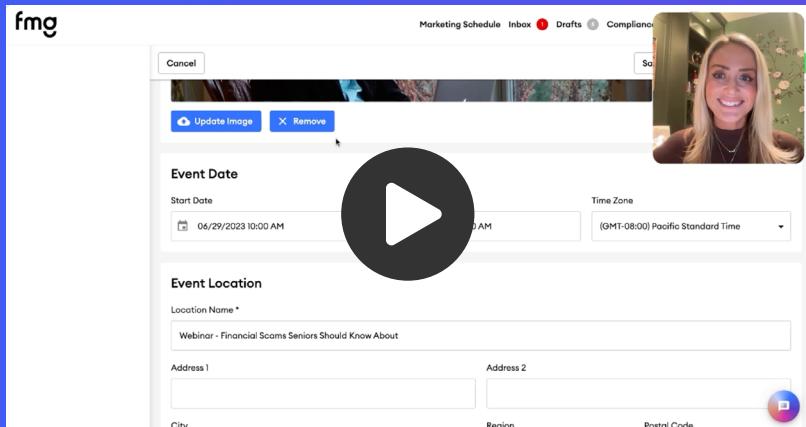


**FMG makes it easy to personalize your communications.** When you sync with FMG, all your CRM client tags (hobbies, life stage, etc.) can be used to create targeted lists with relevant content. Send birthday and anniversary messages automatically – use FMG's pre-made emails or build your own and save it as a template.



# THIS IS **fmg**

How FMG's tools help you **show up authentically at scale**:



## Action Items:

### Quick Wins (1-3 days)

- Add a short video to your next email to create a more personal connection
- Host a simple virtual event to engage clients and prospect

#### How FMG Helps:

- Video Email Widget simplifies recording and embedding videos directly into emails – no external hosting required
- Event Tool provides a ready-to-launch event kit, including presentation materials, speaking notes, and a complete registration workflow you can set up in minutes

### Game Changers (1-4 weeks)

- Record your three essential videos (Founder's Story, Client Experience, Nurture/Reminder)
- Incorporate video across your website and other digital touchpoints
- Plan and promote your first in-person event

#### How FMG Helps:

- Premium Website video integration embeds videos seamlessly on your homepage and About page
- Event Tool manages the full event lifecycle – from promotion and registration to automated reminders
- Proven follow-up workflows help you continue the conversation with event attendees

### Advanced Moves (1-3 months)

- Launch a quarterly event series using a consistent playbook and automated workflows
- Create monthly video blog (vlog) content to drive ongoing engagement
- Repurpose event content into videos, images, and posts across social, blog, and other digital channels

#### How FMG Helps:

- Event Tool scales recurring quarterly event series with templated, repeatable workflows
- Video hosting and distribution publish content across your website, email, and social channels simultaneously
- Content Library allows you to repurpose content from a single event into other marketing assets

# Your 2026 Marketing Advantage: AI + Human Connection

This isn't just another marketing guide – it's your blueprint for thriving in an AI era, where personalization and connection are key.

The question isn't whether you'll use AI, but **how well you'll use it to amplify what makes you uniquely human.**

## FMG: Your Full-Spectrum Growth Platform

FMG is your complete marketing infrastructure built for an AI-first era.

**The Result?** More time for client relationships. Better marketing outcomes. Sustainable, scalable growth.

[Independent Study](#) Finds FMG Delivers:

**26x ROI**

based on average revenue per advisor, average costs, time saved, and revenue lift

**4 hours**

saved weekly per advisor

**6%** increase in lead conversions

**5%** lift in advisor revenue growth

**2%** improvement in client retention

## Ready to Build Your 2026 Marketing Engine?

**Book a Free 20-Minute Consultation** and we'll dive into your specific goals and show you exactly how our tools work together to help you achieve them – with as much or as little effort on your part as you want.

[Schedule Now](#)