As a financial advisor, you know first impressions count— with prospects and new clients alike. Stand out from the competition and take your practice to the next level with these six simple steps.

When you consider that 66% of a prospect’s due diligence occurs BEFORE he or she ever reaches out, it makes sense to invest in a cohesive, coordinated marketing plan that conveys your unique value proposition to prospective and existing clients.

**STEP 1** SET GOALS
Do you want to grow AUM? Improve client retention? Focus on timely, measurable goals.

**STEP 2** DEFINE YOUR AUDIENCE
Play to your strengths. Is there a particular occupation or financial situation you know best?

**STEP 3** SELECT STRATEGIES AND TACTICS
Not every strategy is right for every client, and not every marketing tactic makes sense for every advisor. However, consider whether a blog or active social media presence along with other strategies speaking to your expertise would allow your ideal audience to find you and help you move toward your goals.

**STEP 4** REFINISH YOUR MESSAGE
Create a compelling elevator pitch. Your unique value proposition (UVP) explains why your target client should care about your business. Consider this approach:

- Clients your business serves
- Needs of your target clients
- How your business addresses these needs

YOUR UNIQUE VALUE PROPOSITION

**STEP 5** BUILD YOUR BRAND
Refine existing touchpoints and create new ones to reflect your brand appropriately. Review everything—from office decor to social media, from business cards and brochures to your website and blog—for alignment with your UVP.

**STEP 6** DEVELOP A 12-MONTH PLAN AND MONITOR PROGRESS
Map out the actions you’ll take to put your plan in motion and schedule regular reviews and updates.

**GET STARTED NOW**
Here’s an actionable one-page worksheet with thought starters and tips to jump-start your marketing efforts.

And remember, having a plan is great, but it’s the follow-through that matters.

Sources: “Marketing Power for Financial Advisors” by Bob Hanson and Shirley Hanson; 2018 Putnam Investments Social Advisor Study; Sweor’s Entering a Mobile-First World


57% of clients will not recommend a business with a poorly designed or unresponsive mobile website.

86% of advisors using social media for their business said it helped them gain clients.