

# attract & retain

A content marketing guide for  
growing fiduciary businesses



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# FOREWORD

I interact with financial planners and wealth managers every day and there's one question they ask me more often than any other... How can we attract and retain new clients?

There are, of course, no instant solutions. It's a hugely competitive marketplace. Consumers are more wary of financial professionals and more conscious of exactly what they're paying for than ever before.

Nevertheless there are many companies seeing an exponential increase in assets under management, and they have one key thing in common. *Each has a distinctive message which it's constantly communicating.*

Over the past three years, Ember Television has developed a specialist expertise in helping planners and wealth managers to communicate their message. Though best known for SensibleInvesting.TV, we've helped a number of companies around the world to build an online audience and expand their client base.

This guide by my colleague Sam Lewis sets out how we've done it - and some of the lessons we've learned along the way. Some will read it in one sitting; others will use it as a resource to dip in and out of. Either way, I'm sure you'll find it useful.

I hope, of course, that you'll choose to work with us to achieve the goals you set yourselves. But even if you don't, we wish you well. Slowly but surely the investing industry is changing for the better. First-class content, in conjunction with effective online engagement, has a vital role to play in giving the general public a more successful investment experience.

**Robin Powell**  
**Founder, Ember Television**  
**Birmingham UK, January 2015**

# INTRODUCTION

## Why do financial planners and wealth managers need content marketing?

These are interesting times. As well as politics, culture, the media, education, healthcare and family life, technology is changing how businesses operate. A growing number of people carry around tablets and smartphones, allowing them to tap into more available data than ever before in the history of human civilisation.

It's this insatiable demand for information that is transforming what people expect from service providers. They want access to what they need and they want transparency. Businesses are responding by making sure they can deliver their products and services online to maintain profits or in some instances, their very existence. The financial services are no exception, and neither are financial planners and wealth managers.

Digital marketing, and in particular content marketing, is one area where financial planners and wealth managers aren't taking full advantage of these changes. There is still a demand for financial advice, and as we adjust to a financial system that's being overhauled after the 2008 recession, it's a demand that isn't going away.

This guide aims to demonstrate that, compared with other industries, financial planners and wealth managers have a lot to gain from content marketing. But at the moment, they're the least likely to be doing it well - if at all.

There are many reasons why financial planners aren't taking full advantage of these opportunities - time, budgets, skills - but with this guide, we hope to show that content marketing is not only a viable business strategy, it's also one of the most profitable, fun and satisfying business practices you can do.

It's well known that a business that doesn't adapt to customer demand and market changes is a recipe for disaster. So if you're a financial firm looking to raise awareness of your services, generate leads, build trust with potential clients, nurture the loyalty of existing clients and increase the chance of referrals, content marketing may be the approach you're looking for. And if you've already started, there's no better time than the present to start ramping up those efforts to maintain that competitive advantage.

Chapter One of this guide takes a broad look at what content marketing is, which is a good place to start if you're exploring content marketing or just want to refresh your memory. Chapter Two applies this definition to financial planners and presents a business case. We then hear from Pete Matthew, a financial planner in Cornwall who has enjoyed great success with Meaningful Money TV. This is followed by a look at where to start, with hints and tips to improve existing content efforts, an interview with the Executive Producer behind Sensible Investing TV and then concludes with thoughts on the harmony between content marketing and sound financial stewardship.

We hope you find this guide interesting and if you find it useful, please share it. Thank you.

# CHAPTER 1

## What is content marketing?

When you ask people how they define content marketing, the answers vary depending on what they use it for. Joe Pulizzi, widely considered the Godfather of content marketing, summarises it as:

“...the marketing and business process for creating and distributing valuable and compelling content to attract, acquire, and engage a clearly defined and understood audience - with the objective of driving profitable customer action”

Or, to put it another less formal way:

“Your customers don’t care about you, your products, or your services. They care about themselves, their wants, and their needs. Content marketing is about creating interesting information [i.e. content] your customers are passionate about so they actually pay attention to you.”

For financial planners, content marketing is showing value to potential clients before you’ve even got near their personal finances. Instead of a monologue about yourself and what makes you different (the bedrock of traditional marketing), the conversation is based around them and their needs. Help them achieve their goals in the short-term, and you position yourself to help them for the long-term. In practice then, good content marketing should:

- Generate leads
- Raise awareness
- Create new business
- Help retain existing clients

The content used in a strategy can be lots of things. It could be blogs and videos. It might be a series of webinars. It could be audio podcasts, infographics, eBooks, mobile apps, competitions or even cartoons. But whatever form it takes, it needs to be content - or information - that your audience wants to receive and share.

As with any online behaviour, the principle behind content marketing is not new. In his seminal book on human relationships *How to Win Friends and Influence People*, Dale Carnegie advises that to gain people's trust, you have to talk in terms of their interests. He uses the example of Theodore Roosevelt, who astonished his guests by reading up on subjects that they had personal interests in. "For Roosevelt knew," writes Carnegie, "that the royal road to a person's heart is to talk about the things he or she treasures most." (p.101) And that is the essence of content marketing.

One point that clearly emerges from this is that content marketing isn't about the hard sell - it's about building trust and relationships with leads and clients. For financial planners, a good relationship with their client is fundamental to any lasting and profitable arrangement. It's this idea, amongst others, that we'll explore in more detail in the next chapter.



# CHAPTER 2

## The business case for content marketing for financial planners and wealth managers

“Creating content that is so valuable that people would pay for it, yet you give it away for free, is a reliable way to earn the public’s trust.” - Don Peppers

The financial advice sector in the UK has been established for hundreds of years and has a rich heritage. However, as was mentioned in the introduction, the industry is having to adapt to a number of challenges including the impact of technology on business practices and how it engages the consumer. Here are 9 reasons why financial planners should include content marketing in their business strategy.

### 1. Build trust with your clients

It's fair to say that since the banking crisis in 2008, the finance industry has had a major issue around trust. This hasn't been helped by a string of scandals such as LIBOR fixing and other examples of lapses in market conduct. In fact, the 2014 Edelman Trust Barometer revealed that globally, the financial services continues to be the least trusted industry.

Consumers are rightly sceptical and more keen than ever to ensure they're receiving value for money. In a survey of financial marketers by Editions Financial, 76% believed that content marketing is the most effective way of rebuilding this trust. Providing clients with relevant, high-quality content - whether video, audio or text - is an excellent way of reassuring them that they are.

## 2. Meet your clients where they are

The number of individuals who are most likely to use financial advice are going digital. Research by LinkedIn (Grazel, 2013) shows:

- 84% of the mass affluent audience (mature individuals with £100,000+ in investable assets) in the UK now use social media (Facebook, Twitter, LinkedIn, YouTube, etc)
- 34% use social media as a source of information for personal finance and investment decisions
- 40% used these channels as a way of engaging with financial companies.

Furthermore, CapGemini's World Wealth Report 2014 concluded that "regardless of age, wealth level, geography and need for advice, [high net worth individuals] are demanding digital capability from the wealth management industry."

These statistics show that avoiding social platforms is missing out on another way of generating new business. Going further still, as the Banker's Umbrella puts it, "not being where your clients and prospects expect you to be is a recipe for bankruptcy."

## 3. Future-proof your business

If you thought the financial services industry wasn't competitive enough already, you'd be wrong. In their assessment of the financial landscape in 2014, PwC concluded that growth opportunities for financial businesses are shrinking as new areas emerge. Non-bank and specialist lenders are expected to rise and markets are expanding with new products such as peer-to-peer loans.

In response, they concluded that one of the ways of achieving growth will come from engaging with "digital natives", an ever-expanding group of young people who have

grown up with digital technology. Having a content marketing strategy will reach those already online (see previous point) while making sure you've got a foundation to build upon long into the future.

## 4. Stand out from the competition

Along with trust and apathy, another challenge for financial planners is spelling out what makes you different from your competitors. A quick survey of IFA websites reveals the same buzzwords appearing again and again: knowledge, quality of service, experience, etc. Saying that they have these virtues is fine because after all, that's what the consumer is looking for.

However, rather than saying that you are these things or that you possess these skills, it's far more persuasive to demonstrate them. To illustrate this point: in a job application anyone can say that they're passionate about their work. But if that person has achieved nothing in their previous jobs or they haven't done anything that's relevant, then how "passionate" can they really be? They could be the ideal candidate, but without evidence they would be a risky option.

The same principle applies when converting leads. It's what marketers call thought leadership. We can all say that we have superior knowledge over our competitors. It's working to put that knowledge into action that benefits your client and sets your services apart from your competitors. Content marketing is an ideal way to show, not tell, what makes you different. High-quality content boosts your profile and shows you applying your abilities, giving consumers yet another reason to choose you and your firm.

## 5. Strengthen your online presence

People don't buy pensions or life insurance on impulse. They generally research financial purchases over a period of time. Almost invariably, they'll look online. While

having a website is fine, it's no longer enough to drive traffic and distinguish who you are and what you do from your competition. Not only do you need to create content, it needs to be produced in a way that ensures it's relevant and that it's going to be seen.

This requires a strategy and an understanding of Search Engine Optimisation (SEO). Since Google Panda launched in 2011, Google (currently the world's most used search engine) has prioritised websites by the quality and trustworthiness of their content and information. Using a mixture of content like video, infographics and blog posts will not only provide clients with helpful information they want to read and share - it will also boost your company's online profile, attract your target clients and generate leads.

## **6. Keep up with your competitors**

Although content marketing has been around since as early as 1895, the number of financial planners investing in content marketing is still relatively small. That said, a survey of financial services marketers by Editions Financial revealed that 88% expected content marketing to become more important in 2015 (up from 81% in 2014), and 53% expected their content marketing budgets to increase. As more firms see the value, the more will invest in online content. If you haven't started, it's fair to say your competitors will be at least considering it.

## **7. Expand into new markets**

The world wide web has given businesses access to international markets. Many financial planners target high-net worth individuals in their local region, which makes sense if you want to manage the client relationship face-to-face.

But with communication tools like Skype and WebEx becoming more sophisticated, it's now possible to win clients and manage relations from across the globe. At Ember, since starting content marketing we've generated leads from around the world and work regularly with clients in the USA and Europe. Because the nature of the internet

isn't geographically grounded, high-quality, easy-to-find content can lead to work from areas and markets that you didn't have access to before.

## 8. Attract and engage your target audience

For many people, personal finance is not the most exciting subject. Investors are deluged with printed material that more often than not goes unread. They're far more likely to engage with visual content such as videos and infographics. In the right hands, complicated subject matter based on facts and figures can be made more engaging and accessible for investors, such as [this video explaining the relationship between risk and reward](#).

If you can engage and educate your leads and clients on the basics, the more likely they are to recognise the value of your hard work on their behalf. And once they do, there's a bigger chance that referrals will start happening.

## 9. Compliance and regulation is not a hindrance

Compared with other professional sectors such as healthcare, the financial services are heavily regulated. Creating online content is tricky if you don't want to get into trouble with the regulator. The result is that, as Michele Linn from the Content Marketing Institute puts it, "it's easy to get caught up in what you can't say instead of focusing on what you can do."

But in our experience and the experience of others (as we find out in the next chapter) regulation doesn't mean that financial planners can't publish great educational content that helps develop relationships with leads and clients. Explaining the impartial basics of personal finance doesn't constitute financial advice - save that for your offline meetings with them.

## To summarise

Here's a summary of the business case for content marketing for financial planners and wealth managers:

1. Build trust with your clients
2. Meet your clients where they are
3. Future-proof your business
4. Stand out from the competition
5. Strengthen your online presence
6. Keep up with your competitors
7. Expand into new markets
8. Attract and engage your target audience
9. Compliance and regulation is not a hinderance

# CHAPTER 3

## Seeing a return on investment: the story of MeaningfulMoney.tv

With the business argument for content marketing in mind, are there any successful examples of financial planners who have benefitted from the approach?

Pete Matthew is a Chartered Financial Planner based in Penzance, Cornwall. He's the Managing Director of Jacksons Wealth Management, but he also posts regular content on MeaningfulMoney TV. His aim is to share his belief that anyone can achieve their financial goals through discipline and by following a simple set of rules.

Through regular podcasts, blogs, videos and social media, he gives hints and tips to help people with planning their personal finances. Topics range from explaining the basics like what financial planning is and how to invest, through to more complex subjects like equity release, long term care and how to build a protection portfolio. It's accessible, light-hearted and helpful, and worth watching just for the rolling Cornish countryside that Pete often presents his videos from.

I caught up with Pete to find out how he's benefitted from Meaningful Money TV.

**Pete, obviously financial planners want to see a return on their marketing investments. What benefits have you seen since launching MeaningfulMoney?**

I never set out for MeaningfulMoney.tv to be anything other than a hobby which might help a few people understand more about money. Over the last four years it has become the primary source of new enquiries to my financial planning practice, Jacksons Wealth, and has massively increased my profile within the industry.

### **How long did it take before you started seeing a return?**

It took me 18 months for the first enquiry to come on from someone who had watched my videos online. That was the start of what has now become a steady stream, especially since I started podcasting regularly in May 2013. In Q3 2014, for the first time, online enquiries primarily from MeaningfulMoney overtook client referrals as our number one source of new clients.

### **How else has MeaningfulMoney helped you and your business?**

I have been asked to speak at many industry events, and am now being well paid for this work. I have also been commissioned by providers to produce instructional videos for their customer-facing websites.

### **What are your future plans for MeaningfulMoney?**

It's hard to imagine MeaningfulMoney not being a major part of my working life now, and I have great plans to take it even further, developing my own information products for both the public and advisers.

[Click here to visit MeaningfulMoney.tv](http://MeaningfulMoney.tv)



# CHAPTER 4

## Taking the next steps: where to start, where to improve

We've seen what content marketing is, how it can help financial planners and evidence of how it can generate business. This next section looks at where to start, and if you've already got a content strategy, where to improve. Here are 20 bitesize hints and tips.

(Quick note: these tips have been taken and edited from another of our eGuides, *The 39 Steps to Successful Content Marketing*, written by my colleague Robin Powell. [Have a look at it](#) for a more detailed approach to content strategy.)

## Getting Started

### 1. Define objectives

Your first step is to determine exactly what you want to achieve. Is it raising awareness, retaining existing clients or building a profile that's most important? Or is it purely about conversions and sales? Chances are it'll be a combination of things. But agreeing on what your priorities are from the outset is essential for success.

### 2. Set targets

The most important thing here is to be realistic. Research suggests that it takes between six and nine months for content marketing to start making a significant difference. Or as we saw with MeaningfulMoney TV, 18 months. Don't expect

overnight success. But be specific - for example, you could aim for a number of page or video views per day after, say, six months and a year.

### **3. Identify your audience**

Identify exactly who it is you want to target and find out how they negotiate social media. Ask yourselves what sort of content they'd like to receive. Is it the informed investor, or the retail consumer? Is it financial directors in established institutions? Particularly think about the problems they're facing that you might provide an answer to.

### **4. Produce a content calendar**

A content calendar laying out what content you'll publish when is essential. Factor in key events in your industry, such as institutional reports or the Autumn statement. If required, Google Docs provides editorial calendar templates and WordPress has a plug-in.

### **5. Be consistent**

Decide on your niche and what sort of content you're going to produce on an on-going basis, and when you're going to publish it. Keep testing: if it works, stick to it. Your audience will come to expect consistently regular updates, so don't disappoint them.

## **Choosing the medium**

### **6. Involve your audience**

Don't talk at your audience; talk with them. Mention them in your blogs and videos; thank them for sharing your posts; act on their feedback. Ask them to write a guest

blog, or interview them in a video or audio podcast.

## **7. Interview an expert**

Interviewing an industry expert is an easy way to produce engaging content. Particularly ask them to address concerns and questions your audience has. Repurpose the content so that it has longevity. Turn it into a video - and perhaps a longer audio podcast - and provide the highlights in written form.

## **8. Spread the word**

Post your content to multiple social media accounts. Depending on where your audience go, you should be sharing every post on Facebook, LinkedIn, Google+ and your Twitter account. And make it easy for people to share it via any of their accounts.

# **Honing the message**

## **9. Stop selling**

Content marketing ultimately will increase sales, but it's not a sales tool in itself. Start talking about how great your company is, and people will lose interest. Instead, focus on giving your audience information they want and need. Help them, don't sell to them.

## **10. Feel the pain**

When planning content, think about the challenges facing your target audience. Get inside the minds of your customers... What problems are they having? What keeps them awake at night? Then produce content that addresses these pain points.

## **11. Answer questions**

The hardest part of creating and curating regular content is coming up with ideas. Some of the most effective content is the type that addresses the questions that customers are asking. So listen to what your customers are asking. Look through industry forums. Every question provides potential for a new piece of content.

## **12. Be part of the wider conversation**

Don't see including links to external sites as sending traffic away. People take you seriously when they see your information comes from a reputable source. No one has a monopoly on the best ideas. And quoting experts shows you're part of a wider conversation.

## **13. Include calls to action**

Your content shouldn't be a sales or promotional tool. But do include calls to action - and vary them each time. For example, as well as urging people to phone or email, ask them to submit their details in return for premium content, or to share your content with others.

## **14. Become an industry authority**

Establish yourselves as experts on your industry. Keep tabs on all the latest developments - and any emerging trends. Scan the latest RSS feeds, surveys and reports using tools such as Feedly - and conduct your own surveys to provide new insights.

# Finding the words

## 15. Don't overwrite

When writing a blog or video script, don't write as if it's a formal report. Like Rick Deckard, people can spot if it's robotic and will disengage. But don't make it too conversational either. Avoid jargon and flowery language. Write in plain English. Imagine you're writing for just one person. Help that person. Make an impact on them.

## 16. Don't write for Google

Although key words are important, don't get too hung up on them. Or worse, cram your posts with them. It's unreadable and utterly cynical. Write for your audience - not for SEO. Provide them with informative content and they're more likely to share it and remember you when they come to buy. That way you boost sales and your search engine rankings.

# Keeping going

## 17. Choose quality over quantity

Ideally you need both, but if you really have to choose, choose quality. It's particularly crucial in the B2B sector, where a few strong leads are preferable to scores of inferior ones. There's already plenty of content out there; quality will make yours stand out.

## 18. Curate other people's content

You don't need to produce all the content yourself. Curate the best content that others are putting out. Try using a curation tool like Scoop It, Storify or Spundge. Always credit the content creator and add your own comments instead of just sharing.

## 19. Track the results

Nothing will motivate you more than seeing the fruits of your labours. Another reason for tracking the impact of your content is that it shows you how to tweak future content to ensure it hits the spot. Google, YouTube and HootSuite all provide a wealth of useful analytics.

## 20. Amplify

There are some very effective online tools to help you spread your content far and wide - directories, syndicators, aggregators and publishers. It's worth checking out the likes of Alltop, Reddit, Stumbleupon and Viral Content Buzz, which will link back to your own website.

# CHAPTER 5

## Another perspective: an interview with Robin Powell

Best known as the face of Sensible Investing TV, Robin Powell is a specialist producer and marketer of content for the financial advisory sector. Here he shares his views on why financial planners and wealth managers need to be actively engaged in content marketing and how they should go about it.

### **What do you think financial planners stand to gain from using content marketing?**

The bottom line is that financial planners need to attract and retain clients. Word of mouth is the best way to find new clients, and content marketing is simply an extension of that. It's all about having something valuable to say, generating discussion and gradually establishing yourself, or your firm, as a thought leader.

People need to be educated about investing, and content - especially video - is a powerful educational tool. You also need to give your clients on-going reassurance, particularly when markets are tumbling, and content has a key part to play in that as well.

### **Why do you think the majority of financial planners and wealth managers have been slow to adopt content marketing and social media?**

There are several reasons. Planners are often quite traditional and conservative, especially in the UK where, at least until recently, there have been far more planners in their 40s, 50s and 60s than those in their 20s and 30s. There is a perception too that content and social media are expensive, and whenever budgets are tight it tends to be marketing where savings are made.

Content marketing, done properly, is certainly time-consuming, and the reality is that planners simply don't have the time. The obvious answer, of course, is to outsource, but you absolutely need to find someone you can trust - not least for compliance reasons.

### **Which financial blogs do you most admire?**

As anyone familiar with Sensible Investing will know, I'm a firm believer in evidence-based investing - keeping costs low, diversifying widely and holding for the long term - so I'm naturally biased towards blogs that promote the same approach. For me [the Monevator blog](#) is probably the best in the UK; it's very well written, engaging and entertaining, but also authoritative and genuinely useful. I really like [the Psy-Fi Blog](#) too and, of the commercial blogs, [Wealth Horizon](#) and [Nutmeg](#) are both worth following. There are plenty of good bloggers in the US. Josh Brown aka the Reformed Broker, Ben Carlson, Todd Wenning and Rick Ferri are all excellent, while the best content curator by a mile is Tadas Viskanta at [Abnormal Returns](#).

### **If you could give one piece of advice to a financial planner starting out with content marketing, what would it be?**

Stick with it. As every planner knows, having an investment plan and deploying it are two different things, and it's just the same with content. So, start with a realistic plan and stick with it. Planners often say to me they've tried content before, but you question them further and discover they actually produced one video or one blog several months or even years ago, and they did nothing to promote it. Content marketing does not deliver results overnight or even over the course of a few weeks. But if you commit sufficient time and resources to it and persevere, you will reap the dividends, and so will your clients.



# CONCLUSION

## Content marketing and financial stewardship

The importance of financial advice isn't going away. Despite the Retail Distribution Review, low levels of trust and other changes in UK government regulation, such as pension holders not automatically going into annuity, professional financial guidance has a role to play when clients are making big financial decisions.

One way that financial planners in the UK can restore public trust is to popularise their fiduciary duty. Most of the negative perceptions of the financial industries comes from stories of traders [referring to their clients as “muppets”](#) and lifestyles seen in The Wolf of Wall Street. That behaviour is typical of some banks and institutions. But it ignores those financial planners who, when it's a choice between their profits and the financial wellbeing of their clients, are legally required to put their clients first.

The client-centric approach behind content marketing is an ideal way of demonstrating this duty. It's a conversation based on their needs. And out of all the points made in chapter 2, the trust needed between a planner and their client is paramount to any long-term relationship. When they entrust their life savings and assets to you, they need to know that you're acting on their behalf and in their best interests. As we saw in chapter 3, MeaningfulMoney TV has done just that for Jacksons Wealth Management.

Content marketing is an approach that works for financial planners and wealth managers because it demonstrates how helpful, informed and transparent your services are. Using the simple starting points that can be found online and outlined in this guide, it might be the best investment you ever make - for you and your clients.

# THE NEXT STEP

Ember Television is a content marketing company that specialises in broadcast-quality digital content that is tailored for, and targeted at, the people who matter to you.

Over the years, we've gained a deep understanding of marketing in the financial planning and wealth management sector. We've spoken to the experts. We've interviewed Nobel Prize-winning economists. Our work has been endorsed by some of the brightest minds in the investing world.

That, combined with decades of production experience and our in-depth knowledge of digital marketing, makes us fully equipped to deliver the results you're looking for.

We hope this eGuide has raised questions about how you can generate leads and attract and retain new clients. If it has, then call us on +44 (0) 121 771 3382 or drop us an email at [sam@embertelevision.co.uk](mailto:sam@embertelevision.co.uk).

## About the Author

Sam is a Producer at Ember Television, a content marketing company with specialist expertise in the financial advisory sector. During his time at Ember, Sam has worked closely with investment firms and financial planners in the UK and US to help them achieve their digital marketing goals. Clients include Dimensional Fund Advisors, Independence Advisors and Sensible Investing TV. He's on Twitter @Ember\_Sam, where he tweets about his interests: British cinema, music and ways of using emerging technology to engage and tell stories.

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