



Email Marketing For Financial Advisors

An Overview



Why Use Email Marketing?

- Most cost-effective digital marketing method available
- For every \$1 spent on email marketing, most businesses can expect to receive \$38 in eventual revenue*
- Builds and strengthens relationships with potential and existing clients
- Creates top-of-mind awareness of your brand, even when your messages are unopened

[*Source: Direct Marketing Association](#)

Know the Rules

- Sending unsolicited emails is against federal Law - specifically the CAN-SPAM Act
- You must obtain a client's permission to send email communications - opt-in
- Opt-In can be oral or written via a checkbox on a web form
- All emails must contain a way for users to opt out – all reputable services like Constant Contact have this feature built in
- Never use Outlook, Gmail or other non-bulk email platforms to send mass email

Frequency: How Often Should You Send?

- There is much debate about ideal sending frequency
- People are less resentful of frequent contact if the message contains news and/or helpful information
- 61% of consumers enjoy receiving emails weekly~
- Downward trends in 'open rates' over time can indicate if you are sending messages too frequently

[~Source: Marketing Sherpa](#)

Tips for Building Your List

- Leverage existing client data from sources like Redtail
- Be sure that your staff asks every caller for their email address
- Add email sign-up forms and pop-ups on your website
- Install sign-up forms on your social media pages
- Print the sign-up link on your business card
- Use incentives to capture emails

Use Incentives to Capture Names

- Exclusive information - not found on website
- How-to guides
- White papers
- Forms, toolkits and quizzes
- Giveaways
- Sweepstakes

Good Campaigns Begin with Clear Goals

- Expose clients to new tools and offerings
- Introduce them to new staff
- Provide helpful info about non-financial matters
- Ask Them for Referrals
- Keep them informed about events

Note: Advisor Products email marketing includes calendar workflows to encourage readers to register for live events or webinars

What Kinds of Emails Should You Send?

- Provide readers with helpful financial news including:
 - How to save money on taxes
 - Reduce investing fees
 - Utilize focused financial planning techniques
- Original blog post content
- Third party articles
- Financial Videos

Types of email messages

- Newsletters
 - Typically contain multiple content areas
 - Are great for passing along detailed info
 - Can utilize interactive features like polls and calls-to-action
 - Don't assume all content will be read
- eBlasts
 - Shorter and usually about a single subject
 - Should be able to be read in a minute or less

Video Messages

- Videos Messages Have higher than average open rate[^]
- They can be combined with other news and calls-to-action

Note: Advisor Products video library features weekly news in both video and text, plus calls-to-action for event registration, requesting appointments, and other interactive features

[^] [Source: Marketing Land](#)

How to Create a Successful Message

- Keep it simple and concise
- Use a hierarchy, with the most important info at the top
- Organize text for quick reading - use sections & bullets
- Stick to simple fonts
 - 24 -40 point for headlines
 - 14-16 point for body text
- Include links to your site

Use the AIDA model

- Powerful images attract **Attention**
- Make sure the headline captures **Interest**
- Compose the text to create **Desire**
- Clearly ask the reader to take **Action**

Layout Tips

- Use a strong headline
- Use subheads for longer headline concepts
- Use one prominent graphic
- Use bullets, numbers, bold text and sidebars to break up longer text
- Use buttons & compact graphics for calls-to-action
- Include multiple links to your website

Make Sure to Include a Call-to-Action

- Encourage them to schedule portfolio reviews
- Include links to our appointment scheduling tools to make it easy for readers to schedule appointments online
- Always include links to your website

Subject Line DOs and DON'Ts

- Keep the subject on topic
- Focus on benefits and offer value
- Convey a sense of urgency
- Use numbers & stats to support your message
- Never use emojis
- Avoid 'spam' words – [see a full list here](#)

Be Consistent

- A series of messages sent at regular intervals is the most effective way to build client relationships
- These 'drip' campaigns are 47% more likely to convert into prospects into clients⁺
- **Be consistent!**

[+ The Annuitas Group](#)

Summary

- We hope you have enjoyed this presentation on Email Marketing
- For more information on this and other digital marketing solutions, please see our full **webinar series** or email **sales@advisorproducts.com** to schedule a **FREE** no-obligation consultation