

Hey! What's New? 2025-70

Savvy Marketing Tips for Financial Pros

Matt Neuman writes, on the Kiplinger webpage, that “financial advisers today face a challenging landscape. Fierce competition, increasing client expectations and changing markets demand innovation. To thrive, no longer is it enough to rely on a single approach. Success requires a full-spectrum plan that balances active, passive and client marketing strategies.” Neuman then offers some proven, practical processes and strategies to help financial advisers rethink their marketing efforts for smart growth.

Neuman first deal with active marketing, which he says refers to direct efforts designed to generate fast results. “It’s the driving force behind filling your pipeline and growing your visibility.” Here are some key approaches that can deliver results:

Educational workshops. “Hosting seminars on retirement planning or tax strategies allows you to showcase your experience while engaging prospective clients,” Neuman advises.

Media campaigns. He suggests incorporating radio, TV or digital media to expand brand recognition. “Clear calls to action, such as webinars or strategy sessions, transform visibility into tangible leads.”

Books and publications. Publishing a book can establish you as an industry leader, Neuman says. “One adviser leveraged books on specialty topics, such as Social Security, to help enhance credibility and support event marketing.”

Client events and referral programs. “Events strategically tied to referral incentives work wonders for attracting quality prospects. Incentivizing referrals with charity donations or gifts can create goodwill while encouraging participation.”

Neuman then moves on to passive marketing which he says helps advisers cultivate trust over time. “It keeps prospects and clients engaged, even when they’re not ready to commit. With automated tools and consistent outreach, passive strategies do the heavy lifting.” He suggests efforts such as:

Email drip campaigns. “Share value-driven updates through weekly emails, trending topics and newsletters. Automated messaging nurtures prospects so they think of your brand first when they’re ready.”

Targeted content marketing. “Create resources like blogs, whitepapers or podcasts to address common questions or concerns. YouTube videos are also a powerful way to humanize your brand.”

Dedicated follow-up teams. “Invest in trained professionals to provide one-to-one outreach through follow-up calls or texts. This human touch fosters connection, even in an automated process.”

Neuman then moves on to client marketing – also described as client care – “which focuses on delivering exceptional service to your current clients. Why? Satisfied clients are more likely to expand their portfolios with you and refer others.” Here, he suggests:

Organized client reviews. “Reviews no longer serve as simple check-ins. They should be purposeful, structured and revenue-generating opportunities. Prepare by assessing accounts and identifying specific strategies or improvements ahead of the meeting.”

Exclusive client events. “Host appreciation events or webinars that deliver value while deepening trust. You’ll strengthen relationships and foster opportunities for organic referrals.”

Here’s how you can start applying these marketing strategies to transform your business:

Think holistically. “Balance active, passive and client marketing to create a full-spectrum approach. No one strategy fits all scenarios.”

Measure what matters. “Analyze ROI for every campaign, from seminars to email sequences. Adjust your efforts based on the results.”

Host purposeful events. “Educational workshops, client appreciation gatherings and seminars boost engagement and reinforce your status as a trusted resource.”

Smart, intentional marketing doesn’t just acquire clients, Neuman concludes, “it builds relationships, secures trust and fosters loyalty. By implementing even one or two of these strategies, you can dramatically amplify your growth and create lasting success.”

Discover more at [Savvy Marketing Tips for Financial Pros From a Financial Pro | Kiplinger](#).