

How Financial Advisors Generate New Client Prospects Using A Simple Ads Strategy

The Challenge:

When financial advisors come to us, they have been relying on various grassroots marketing campaigns and referrals to gain clientele in the past. They would spend countless hours during the week promoting their financial advising services, and yielding little to no results. Or, they just didn't do anything to promote their firm and end up relying purely on existing clients and a referral here and there, but these tactics never actually take them to that next level of growth.

Several of them were even spending over \$250 per new prospect with other lead generation services and oftentimes, they were not a good fit for their services because they were simply leads that were purchased from a list of demographics.

They needed a way to keep their pipeline full with potential prospective clients and sign new clients every month without adding a huge marketing expense or hours of extra work.

The Solution:

After analyzing each of the advisor's processes and target market, we implemented a 5-step Facebook advertising campaign with the ultimate goal of getting more prospective clients to become interested in financial advising services and building a relationship with them.

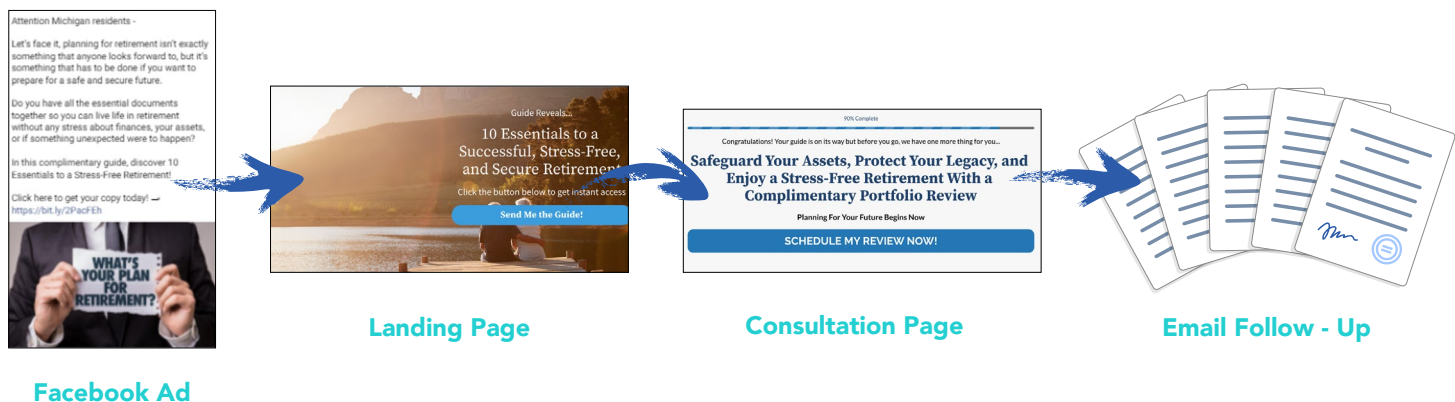
The Campaign Consisted of 5 Parts:

1. Specific messaging that spoke to their target audience.
2. A PDF that highlights the pain points of their ideal prospects or another piece of valuable content that helps answer questions that a person may have about their financial situation (ie. retirement, investing, etc.). Prospects would enter their information in order to request the guide and that adds them to the advisor's email list.
3. A Thank You page that directed the leads to schedule a call.
4. Follow-up emails that delivered the PDF and tied back to scheduling a consultation call.
5. In some cases, we even included follow up phone calls to people who downloaded the guide and encouraged them to book a call using our proven call scripts.

PLUS

our system has been generating new prospects
at less than $\frac{1}{4}$ of the cost that the advisors had
been spending previously!

Here is an example of the funnel we ran for one of these advisors...



The Results...

Since launching their Facebook ad campaigns, these advisors are adding an average of 30-60 new prospective clients to their pipeline every month and a good number of them have booked appointments along the way.

And, with hundreds of subscribers added to their email lists, the potential for additional revenue is huge. With the right follow-up sequence in place, a large percentage of these qualified prospects will likely become a client over time.

The best part? This system is EASILY replicated month after month, allowing these advisors to consistently grow their prospect list, increase awareness, and fill their calendar with appointments. Since launching these campaigns, we've worked with several other financial advisors to implement these same strategies and achieved similar success.

Choosing the right financial advisor is not an easy decision or a fast decision for people to make. It's their life savings and future at stake. Our goal with these campaigns is to **implement a proven methodology for adding new people** into an advisor's pipeline that they can start to build a relationship with, share additional valuable content and information over time, and work towards becoming a trusted advisor for these individuals by staying in touch.

This system has been proven in various geographic markets and demographic populations. We strive to take "prospecting" off the plates of the advisors so that each advisor can spend more time doing what they do best - working with their clients to help achieve their lifelong goals.

Tired of Relying on Referrals to Generate More Client Prospects?

Schedule an appointment and let's chat to see how we can help generate quality appointments for your business!