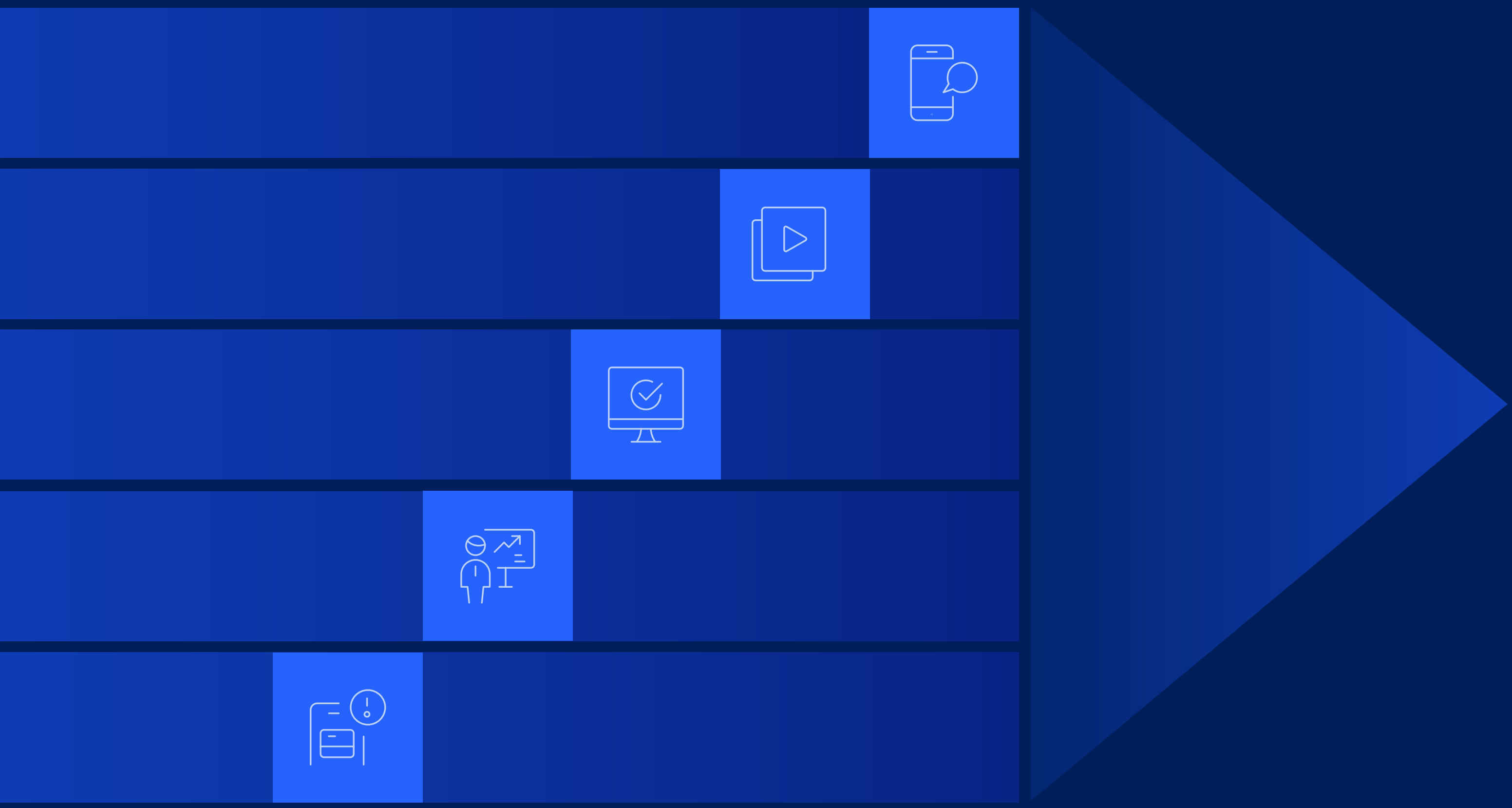
Broadridge®

The Definitive 2026 Advisor Marketing Playbook



Every advisor wants an edge on growth. But it's easier said than done.

The **Broadridge Advisor Marketing** guide gives you a clear blueprint for the marketing areas that drive measurable growth.

The insights are grounded in proven data from Broadridge's award-winning study on advisor growth and marketing performance. Each section includes key insights, actionable recommendations and a checklist to help advisors put ideas into action.

85%

of advisors state it's a challenge to find time for their marketing.

Faced with limited resources, advisors need to focus on what really moves the needle.

The five pillars of effective advisor marketing

Website presence

Stand out from the crowd with a digital presence that attracts clients and instills confidence.

Where most advisor websites go wrong

In a sea of sameness, your website should make you memorable. Here are the most frequent barriers that stop advisor websites from turning visitors into clients.

Cluttered, inward-facing messaging

First impressions are everything, and people will judge your website in an instant. Messaging focused on investors' goals and interests will go much further than jargon-heavy blocks of content.

J. Smith, CFP®
20 years' experience helping high-net-worth investors diversify assets in active and passive portfolio investments.

Helping business owners plan for retirement
Helping you retire confidently, while enjoying today.

Poor user experience

Many people will browse your site on phones or through voice assistants. Your site must load quickly and work smoothly on every device. If pages look distorted or menus are hard to use, visitors will leave and assume your business is outdated.

Investors will decide whether to stay on your website within **50 milliseconds**

Faster load times lead to **3x more conversions**

Slow loading speeds

Pages that load in one second deliver three times more conversions than five-second pages.

Lack of promotion

"If you build it, they will come" might work in the movies, but not online. Conversion rates climb when you make a concerted effort to promote your page.

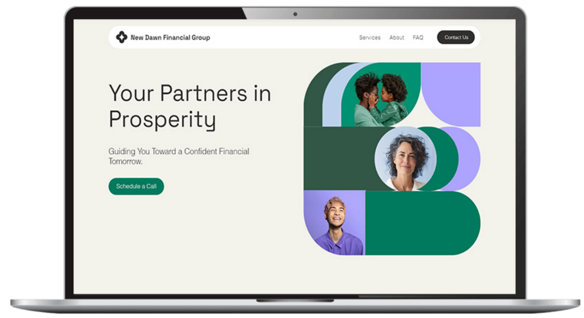
Paid ads and local business directories help boost your presence. To stand out in search, prioritize keywords for search engine optimization (SEO) and its new AI-favored companion, answer engine optimization (AEO). AEO is drawn to Q&A formats, such as distinct FAQ sections or a copy approach where subheads pose questions that are answered in the underlying paragraph.

62%
of advisors find their website ineffective at generating leads.

1–2
website leads generated per month, on average.

168%+
more website leads each month when advisors follow a defined marketing plan.

Four essentials for a high-performing advisor website



1 Create clear, memorable positioning

Your homepage needs to make your value clear within seconds. Use a strong headline that speaks directly to your ideal client and shows how you help them.

Add 3–5 short bullets that highlight the benefits of your approach, and the outcomes clients can expect. Keep every message focused on the client by showing how you address their goals and solve their challenges.

2 Inspire trust and signal credibility

Make it personal

Display professional headshots, team biographies, and credentials that signal trust, including professional certifications (e.g., CPF, AIF), awards, affiliations, and media mentions.

Share success stories

Highlight client testimonials or case studies (with permission) that underscore your ability to navigate real-world complexities as a trusted partner.

Be reachable

Prominently feature your address, phone, email, social links, and call to action. Allow people to easily connect with you by minimizing the number of fields in your contact forms.

Become a go-to resource

Provide ongoing value with articles, videos, and calculators that address investors' pain points. Regularly update pieces, including FINRA-reviewed resources, to encourage repeat visits. Use gated content that requires contact details to turn anonymous visitors into warm leads.

3 Prioritize a clean and fast investor experience

Responsive design: Ensure your site adapts to various screen sizes (mobile, tablet, desktops, and laptops).

Fast load times: Optimize images, videos, and designs for quick load times.

Clear navigation: Utilize tap-friendly navigation and simplified forms to make it effortless for prospects to access your site.

4 Get discovered in search (SEO) and AI-generated results (AEO)

- Stand out in searches by selecting 5–10 key SEO phrases prospects may search for and feature them prominently, especially in headings and subheads.
- Improve your visibility in AI-powered searches by adding FAQ and About sections, and ensure your website supports structured data so search tools can understand it.
- Increase your digital footprint by submitting your site to Google My Business, Yelp, and other online business directories.

Your website tune-up

Use this easy checklist to sharpen your online presence and ensure your website works as hard as you do.

1 First impressions audit

- [ ] Define your ideal client/audience (e.g., retirees, business owners, etc.)
- [ ] Confirm that your homepage quickly highlights the benefits you deliver
- [ ] Use a strong headline that speaks to the problem you help solve
- [ ] Add an about section explaining who you are and how you help

2 Easy navigation and fast performance

- [ ] Ensure your site loads quickly on desktop and mobile
- [ ] Test that your site displays properly on mobile, tablet, and desktop/laptop screens
- [ ] Make sure your navigation is simple with clear, descriptive labels (About, Services, Resources)
- [ ] Check accessibility basics: readable fonts, text is easy to read across site
- [ ] Test all forms and links to avoid broken pages

3 Clear content and helpful resources

- [ ] Check if your website is written in plain language and focuses on what clients gain
- [ ] Does your site provide helpful articles, videos, guides, and calculators clients enjoy?
- [ ] Add compliance-approved disclosures, legal statements, and privacy policies
- [ ] Regularly update your site to prevent it from appearing abandoned

4 Convert visitors into leads

- [ ] Display your contact info, social media links, and scheduling options on every page
- [ ] Offer resources (newsletters, guides, checklists) in exchange for email addresses
- [ ] Add an online scheduling tool to allow visitors to make appointments
- [ ] Include testimonials or case studies if allowed by your firm's compliance rules
- [ ] Track form submissions and lead activity to see what is working

5 Get discovered and drive more traffic

- [ ] Optimize key pages with SEO and AI metadata
- [ ] Add simple FAQ sections to show up in AI-powered and voice searches
- [ ] Share your website content through email and social channels to increase reach
- [ ] Submit your website to local business directories to improve your visibility
- [ ] Run branded ads to increase your traffic and discoverability by ideal clients

Want to transform your website into a steady source of new clients?

Download our free *Advisor's Guide to a High Performing Website*, which outlines how to supercharge your website to convert traffic into qualified leads.

Download eBook

Video marketing

Turn your expertise into a memorable experience with captivating videos.

A strong fit for short attention spans

Investors today are used to scrolling and watching content in bursts, which means long reports or wordy whitepapers often go unread.

Short, bite-sized videos are ideal for capturing attention and delivering key insights efficiently. Longer educational videos still have a place and can be repurposed into shorter clips for audiences who prefer concise content spread out over time.

71%

of consumers watch short-form videos daily, spending up to 45 minutes a day scrolling.

Ideal video lengths

1 minute or less
for videos designed to raise awareness and engagement on social

3-5 minutes
for education, explainer, and demo videos

Viewers retain

95%

of a message from a video versus **just 10% from text.**

Use personalized videos to deepen relationships

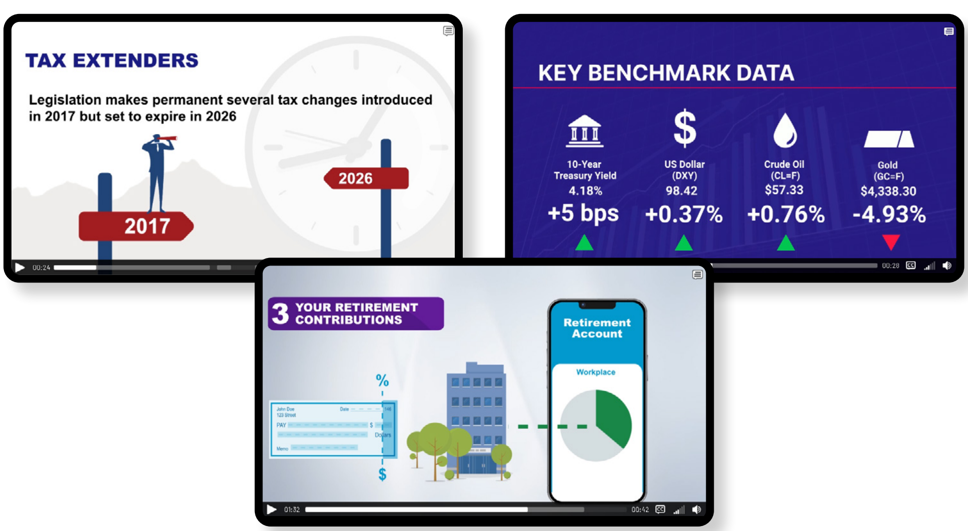
Beyond your marketing, you can send brief, tailored videos to clients or prospects.

Shooting a quick welcome video or a direct response to a client's question helps demonstrate your commitment and builds stronger relationships without requiring huge effort. You can even create a series of short videos addressing common client questions to reuse and minimize the effort needed.

Only

11%

of advisors have prioritized video with platforms like YouTube and TikTok.

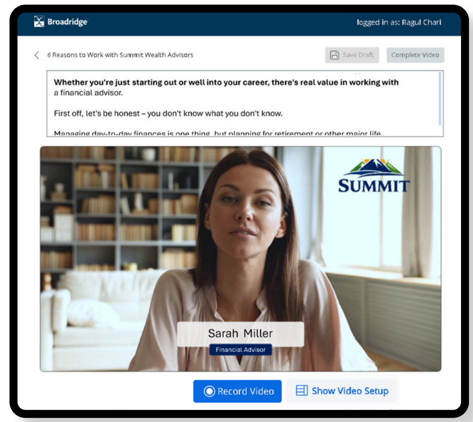


The advisor's guide to producing high quality videos

Lights, camera, action
Many advisors believe they need a studio or costly gear to start filming. A simple setup works well. In fact, 97% of LinkedIn videos are recorded on a smartphone and only 22% use professional equipment.

A phone or laptop, decent lighting, and a clean background are all you need to produce effective videos.

Every video should tell a story
Whether you cover your approach, investor pain points, or market movements, make sure each part of the video creates a clear narrative with practical takeaways.



Four video types to kickstart your library

Selfie-style	Educational	Niche topics	Series concepts
Fast, personal, and easy to share	Clear, compliant, and to the point	Tailored to personas and your specialties	Episodic content to build familiarity
Up to 3 minutes	**10-30 minutes**	**1-5 minutes**	**1-10 minutes**
Examples • Why I became a financial advisor • A lesson I learned from a client • Share an update about your firm such as introducing new staff or being out in the community	**Examples** • Understanding market volatility • Explaining a financial concept quickly • How to start saving for retirement • What happens to your 401(k) when you change jobs	**Examples** • Financial planning for new parents • How women can build wealth • Three smart tax moves for small business owners • Investing in your 30s vs. 60s	**Examples** • Market updates • This month on Wall Street • Investing impacts throughout history • Highlight a client story each quarter

Plan your content, but keep it natural
It is important to cover timely topics and offer clear takeaways. Memorize your key points, speak naturally, and record a few times until you feel comfortable on camera. With practice, you will find the tone and length that work best.

Promote your videos across your digital properties
Once you record a video, don't forget to share it. Post it to your social channels, place it on your website, and include it in your emails. Small adjustments to size and format help it perform well across different channels.

Video marketing made simple

This checklist walks you through the essentials for creating strong, credible, and easy-to-share advisor videos.

1 Video foundation and setup

- [ ] Set clear goals for your videos (e.g., awareness, education, or nurturing)
- [ ] Define who your videos are for (young families, pre-retirees, business owners, etc.)
- [ ] Choose your filming style:
  - Simple smartphone or laptop setup for quick social videos
  - Tripod, mic, and lighting for polished, evergreen content
- [ ] Pick a consistent filming spot with a clean background and good lighting
- [ ] Check your framing, audio, and any branding you want on screen

2 Content planning

- [ ] Plan your content around client needs and pain points (e.g., market trends, life events, retirement planning, inheritance, etc.)
- [ ] Use a mix of the four types of video:
  - **Selfie-style (Up to 3 mins):** quick, personal insights or reactions
  - **Educational (10–30 mins):** explain key concepts or answer common questions
  - **Niche topics (1–5 mins):** content targeting a specific audience or life stages
  - **Series concepts (1–10 mins):** recurring topics that establish consistency
- [ ] Create scripts or outlines that balance structure with authenticity

3 Recording best practices

- [ ] Record in a quiet space with minimal background distraction
- [ ] Speak clearly and naturally, as if talking to a client
- [ ] Use simple graphics or captions to highlight your key points
- [ ] Include a compelling opening within the first 5 seconds to keep viewers watching
- [ ] Add any necessary legal or compliance disclosures
- [ ] Check your lighting and audio before recording to avoid additional reshoots
- [ ] End each video with a clear next step for viewers to encourage leads (e.g., learn more at my website, schedule a meeting, download our guide)

4 Distribution and promotion

- [ ] Add your videos to your website's resource section or homepage
- [ ] Include the video newsletters and client onboarding communications as relevant
- [ ] Share clips on your social media channels (LinkedIn, Instagram, Facebook, etc.)
- [ ] Include a clear direction in messages on what users should do to learn more (e.g., visit your website, download your guide, schedule a meeting)

Social media

With billions of daily users, social media has replaced TV, radio, and traditional advertising as a key place to be discovered.

Grow your visibility on relevant social platforms

Many advisors rely too heavily on one social platform and overlook the rest. High-growth advisors take advantage of networks like Instagram and LinkedIn because each platform reaches a different audience with a different tone. Use the channels that fit your clients, but avoid putting all effort into a single network.

LinkedIn remains very useful for B2B, high-net-worth, and other professional client engagements.

Instagram humanizes your brand with the people and moments that make your business special.

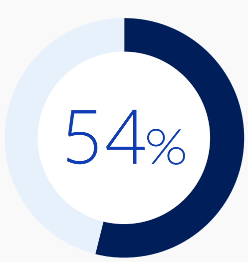
Facebook covers a wide demographic and is a great place to feature life events and personal interests.

YouTube can be a home for educational content that proves your value to investors.

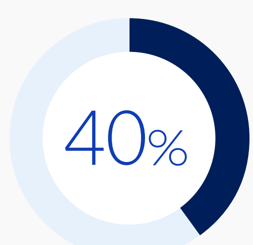
Ditch the obvious pitch

Skip the hard sell. Investors pay more attention to educational content that helps them understand what is happening in the market and what it means for them. Use simple explanations and real-life examples to build trust and credibility.

The payoff for high performers



of leads captured on AdvisorStream[1] came from social media.



converted at least one social media lead into a client.

[1] AdvisorStream is a component of Broadridge's Advisor Solutions, a complete marketing system for sustainable growth that provides everything from advisor websites, social media, and email campaigns.

83% of adults have at least one social media account.

79% of Gen Z and Millennials have turned to social media for financial guidance.

Advisors are **42%** more likely to convert a social media lead into a client if they have a defined marketing approach.

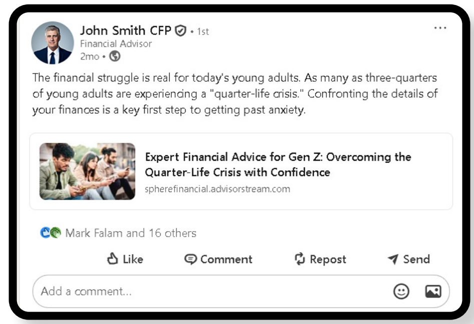
40% of investors under age 35 would use social media to find an advisor.

From boring to roaring: Five ways to boost engagement

1 **Define a target audience for your posts**
Choose the audience you want to reach and shape your content around the topics that matter to them. Consider their key life events, interests, and financial priorities.

2 **Impress investors with polished profiles**
Optimize your social profiles with a professional photo, your website link, and a short description that explains who you are, what you offer, and the type of content you share. Give visitors enough information to understand your expertise and what sets you apart from other advisors.

3 **Stay consistent with timely updates and posts**
Keep your profile fresh with consistent, timely posts. Infrequent updates make your page look inactive and reduce trust. Regular content shows you are accessible, engaged, and committed to supporting investors.



LinkedIn pages that post at least twice a week grow **5X** faster

To keep your audience engaged, diversify your content:

Educational content
Share timely resources to help investors understand events in the news and financial concepts.

Short form video
Bite-sized videos draw attention and encourage engagement. Distill advice into 30-60 second clips and share regularly.

Polls and quizzes
Use polls to gather quick feedback, but do so sparingly to prevent fatigue.

Personal anecdotes
The occasional peek into your day-to-day life will show you are relatable. Just be sure to avoid touchy subjects, such as politics.

4 **Create a lead capture plan**
Don't just converse, convert. Offer newsletters or gated content to capture the contact details of engaged followers to convert clicks into clients.

5 **Remember to be human**
Emphasize the social element. Connect with people you meet at events. Tell relatable stories. Comment on others' posts to potentially meet new investors and professional partners. Every angle can help grow relationships and capture more assets.

Optimize your social media

Give your social media profiles a tune-up with these easy-to-implement best practices.

1

Polish your social profiles

- [ ] Add a recent, professional profile photo
- [ ] Add a clear description of who you are and how you can uniquely help investors
- [ ] Add your website and contact details
- [ ] Keep your bio simple, current, and focused on client benefits
- [ ] Ensure consistent branding, descriptions, and photos across each social platform

2

Commit to consistent posting

- [ ] Post at least twice a week on your key social media profiles
- [ ] Share timely updates that reflect current events and market conditions
- [ ] Mix in content on "financially adjacent" topics (lifestyle/wellness/travel)
- [ ] Use automation tools like **AdvisorStream** to save time

3

Share content that educates and engages

- [ ] Diversify your content by including financial literacy content
- [ ] Share a mix of content (articles, infographics and news stories)
- [ ] Use polls occasionally to gather quick input and encourage easy engagement
- [ ] Mix in light personal updates to humanize your firm
- [ ] Make sure you have compliance and legal permission for the content you post

4

Capture leads, not just likes

- [ ] Offer newsletters or gated resources to capture investor contact details
- [ ] Ensure content you create or share prominently displays your contact details
- [ ] Engage thoughtfully with clients, peers, and Centers of Excellence on social media
- [ ] Tag partners or local groups when relevant to broaden reach of your posts
- [ ] Every month, assess which posts and content drove the highest engagement

5

Promote your presence

- [ ] Add your social media links to your website's header, footer, and contact page
- [ ] Include your social handle on business cards, brochures, and event materials
- [ ] Add social links to your email signature and meeting follow-up templates
- [ ] Connect with existing clients and new prospects after meeting with them
- [ ] Mention your social channels and website in webinars, seminars, or workshops

Want to step up your social game even further?

Check out our *Winning Approach to Social Media Marketing* webinar, which covers how to create a scroll-stopping social media presence without adding to your workload.

Watch the replay now

Event marketing

Be the host with the most and accelerate growth.

Events help advisors spark new relationships, showcase expertise, and turn warm interest into real growth. They open the door to deeper conversations and complement the awareness you build online.

7 of 10 advisors had success obtaining leads by hosting events

65% of advisors are doing fewer than one seminar or workshop per year

Events come in all shapes and sizes

Expand your reach with in-person, digital, and hybrid events
In-person events create strong connections, but not everyone can attend. Virtual and hybrid options help more people join, and live streams allow you to extend the room online. Save key video clips for future marketing and follow-ups.

Client appreciation or community events
Events do not need to be strictly financial. Host casual gatherings like tastings, games, workshops, or themed activities to meet new prospects in a relaxed setting. You can also support or sponsor local community events to widen your reach.

Consider co-hosted events
Work with local centers of influence such as attorneys, CPAs, real estate agents, or community organizations to co-host events. Tap into these networks to maximize attendance and deliver personalized seminars catered to their needs.

Cater to your prospects' niche
General topics rarely stand out. Create sessions that speak to a defined need or group, like tax planning for business owners, retirement strategies, and women investors.

Teach first, pitch later
Overt selling turns off prospects. Here's a simple sequence for success:

Educate → Hold Q&A → Explain your value → Personalize follow-ups

Use events to showcase you
Events give you a captive audience to demonstrate your value. Your insights show investors how you can support their financial goals, and informal conversations help them connect with you on a personal level.

It also becomes easier to spot prospects who are close to committing and guide them through any remaining concerns.

The three Ps of events: Planning, promotion, and post-event follow-ups

Seminar or webinar?

Each has its advantages. We suggest alternating between the two.

In-person or hybrid seminars

- Smaller audience, more intimate setting
- Direct conversations
- Perks for in-person attendees (e.g., free meal or activity)

Online-only webinars

- Not tied to geographic area, more potential attendees
- Convenient timing flexibility
- Easier to record and share

Promote through multiple channels

Direct mail

- Find a service that can help you promote your event with invites sent to prospects within a 20-mile radius of your seminar location (for in-person events)
- Use mailed invitations that stand out from typical business correspondence.

Online

- Invite contacts through existing email lists and then spread the word with social media posts
- Link to a landing page with clear event and signup details.
- Gather contact information for reminders and post-event campaigns

Social

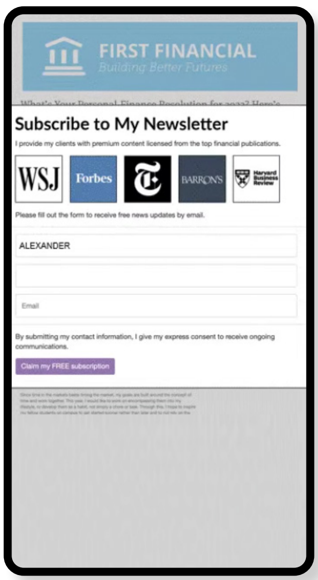
- Promote your event in personal posts as well as periodic sponsored ads on different platforms leading up to the event
- Conversations can help build a buzz Ask followers to submit questions or subjects they'd like you to feature on the agenda

Must-haves for every invitation and ad

Topic and agenda	Speaker information	Registration instructions	Link to your website

Nail your presentation

Shape your content around real-life events. Older investors want guidance on Social Security and retirement income, while younger audiences focus on buying a home, starting a family, or paying down debt. Use a clear title and simple visuals to support your message. Practical education builds trust and opens the door to follow-up conversations.



Follow-ups fuel conversions

Post-event campaigns are as crucial as the event itself. Strategize how and when you will reach out to attendees. Ideally, you will be able to leverage personal information you learned during the event.

- Invite prospects to your **email newsletter** for financial literacy tips and news
- Send **relevant articles** around the topic(s) and theme(s) you discussed
- Record a **personal video** restating key takeaways and your differentiators
- Encourage them to **book a meeting** where you can discuss their goals

Event marketing for advisors

1
Strategy and goal setting

- [ ] Decide the goal of the event: educate, deepen relationships, or client appreciation
- [ ] Choose how often you will host events (e.g., quarterly, annually)
- [ ] Set simple and realistic goals: number of attendees, number of events run each year
- [ ] Pick the format that fits your audience: in person, virtual, or hybrid

2
Content and agenda

- [ ] Choose the topics or themes for your event — addressing a clear client problem or milestone
- [ ] Put your presentation together: include your branding and contact details
- [ ] Use plain language, real stories, and visuals to explain your concepts
- [ ] Prepare handouts, workbooks, and follow-up resources with your branding
- [ ] Prepare speaking notes and if co-hosting, agree on who covers which parts

3
Logistics and experience

- [ ] Book the venue or webinar platform early and test sound, lighting, and internet
- [ ] Pick a time that works for your audience, such as early evening or lunchtime
- [ ] Offer a small value-add like a meal, guide, or consultation session
- [ ] Collect basic details at registration: name, email, phone, and main area of interest

4
Promotion and registration

- [ ] Start promoting three to four weeks before the event
- [ ] Send invitations by email and, if useful, direct mail
- [ ] Create a simple landing page with details, benefits, and a signup form
- [ ] Promote on social channels and ask for questions in advance
- [ ] Send reminder emails or texts before the event

5
Delivery and engagement

- [ ] Arrive early to test all technology and greet guests
- [ ] Open with a short personal story to build rapport
- [ ] Encourage questions during and after the presentation
- [ ] Encourage all attendees to sign up for your newsletter to stay informed

6
Follow-Up and conversion

- [ ] Send a thank-you message with a recap and resources within 24 hours
- [ ] Invite interested attendees to book a one-on-one meeting
- [ ] Add new contacts to your CRM and marketing systems like AdvisorStream for ongoing nurturing
- [ ] Review results and adjust topics, timing, and format for the next event

Not sure where to start?

Broadridge's Event Marketing gives you everything you need for a successful event, including planning support, ready-made presentations, and even help filling the seats.

Learn more

Prospecting and nurturing

Relationships do not grow overnight. It takes persistence and care.

Impersonal, infrequent engagement won't cut it. Investing a little extra time and money is well worth it. You'll convert and retain more valuable AUM.

Winning a new client takes time…

3.6 months
to convert marketing prospects on average

1.7 months
to convert client referrals on average

but you can lose their attention, fast.

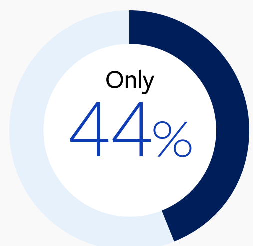
79%
of consumers scan, rather than read, emails

≈30% of emails are read for **less than 2 seconds**

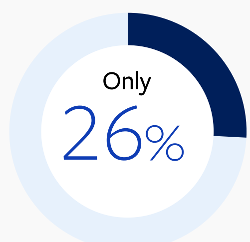
≈41% for **2–8 seconds**

≈29% for **more than 8 seconds**

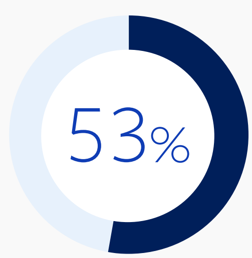
Where do most advisors go wrong?



share personalized content



communicate often enough



of investors want financial education from their advisor

Every $1 spent on email marketing results in $36 in ROI (on average)

Turn cold leads into warm conversations

Audiences tune out when messages never change. Use a mix of formats and subjects to keep your insights fresh and engaging.

14.3% of investors would choose to work with an advisor based on their level of communication

Provide education and context on market changes

One way to stay fresh is to provide consistent perspectives on what's happening in the market. Relevant advice positions you as a thought leader and fosters trust.

Blend your own personal insights with timely content you create or source from firms like Broadridge. We provide monthly, quarterly, and annual summaries in text and video formats that include thought leadership and explore financial-adjacent topics, personalized for each recipient.

Solve problems for free

Offer guides, calculators, workshops, and other items that deliver immediate value to prospects. By building goodwill with a prospect before they become a paying client, you can bring them into your book of business with less friction.

Nurture through your network

Professional relationships are high-quality pipelines for referrals. Work closely with centers of influence to source new leads and share the free content described above.

Newsletters

Consistent, broad touchpoints keep you top-of-mind with prospects and clients. Mix market updates, education, and even lifestyle content for more powerful impacts.

Campaigns

Targeted, value-driven drip sequences guide investors further along the client journey from your website, social, and event interactions.

One-to-one outreach

It pays to be direct. Unlock deeper conversations with hyper-personalized emails that speak to specific investment goals and interests, life events, hobbies, and more.

eCards

Milestones are worth celebrating. Commemorate special moments to show investors that you are more than a financial resource; you're supporting their journey through life.

Five easy email enhancements

1. **Clean up** your lists regularly
2. **Segment** audiences by life stage, goals, and preferences
3. **Cut out** the industry jargon
4. **Focus** on hard-hitting subject lines
5. **Write** with a call to action in mind

A guide to stronger prospecting and nurturing

1 Strategy and planning

- [ ] Define ideal prospects (demographics, goals, life stages)
- [ ] Segment contacts (e.g., pre-retirees, business owners, newly married)
- [ ] Set communication rhythm: monthly education + campaign follow-ups
- [ ] Use automation to scale, not to replace a personal touch

2 Purposeful prospecting

- [ ] Lead with value and offer insights, education, tools or resources
- [ ] Track all leads in your CRM (from web, social, referrals)
- [ ] Connect via multiple touchpoints: events, social media, emails
- [ ] Follow up within 48 hours of each new contact
- [ ] Partner with centers of influence (CPAs, attorneys, etc.)
- [ ] Ask prospects to subscribe to your newsletter

3 Personalization and content

- [ ] Tailor messages to your audience’s interests and life stages
- [ ] Mix curated and original content to balance your expertise with trusted third-party perspectives
- [ ] Uncover prospect interests and life events by reviewing their engagement

4 Email nurturing

- [ ] Maintain a steady cadence (weekly newsletters, monthly market updates, targeted outreach)
- [ ] Apply best practices:
    - Keep lists clean and segmented
    - Write clear, concise subject lines and CTAs
    - Add short videos or visuals for engagement

5 Relationship nurturing

- [ ] Send personalized notes and eCards to celebrate client milestones
- [ ] Host appreciation events and educational webinars
- [ ] Keep tone genuine, helpful, and consistent

6 Measurement and improvement

- [ ] Track engaged clients in your marketing tools and CRM
- [ ] Survey new clients to learn which outreach resonated most
- [ ] Refresh campaigns quarterly and re-engage cold leads regularly

Turn your inbox into a growth engine

Our free guide, Inbox influence: Email marketing for financial advisors, gives you a complete blueprint for getting results from your email marketing. It covers strategy, tools and practical steps to generate trust, credibility and new business opportunities with the clients you want most.

Download eBook

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Appendix

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