



Digital Client Engagement

Understanding the Risks and Reaping the Rewards

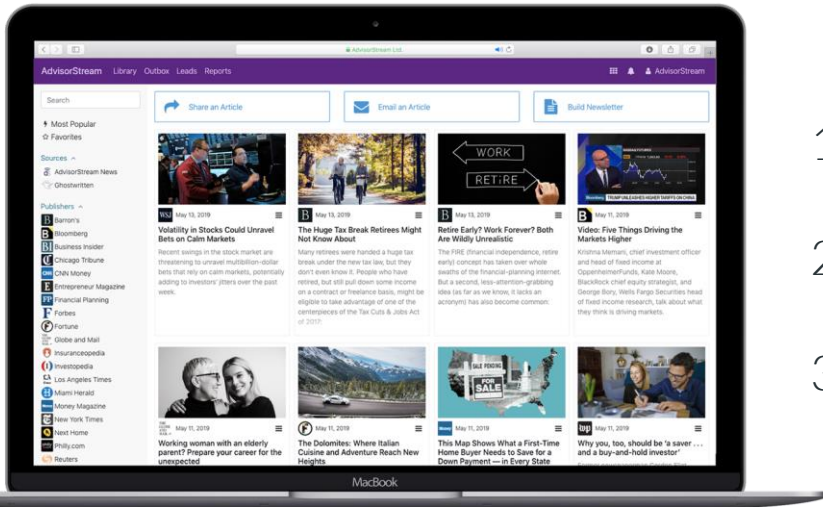
Kevin Mulhern - CEO & Co-founder
Karim Rashwan, CFP - Director of Product

2019

We Deliver a Wealth of Credible Content



Agenda

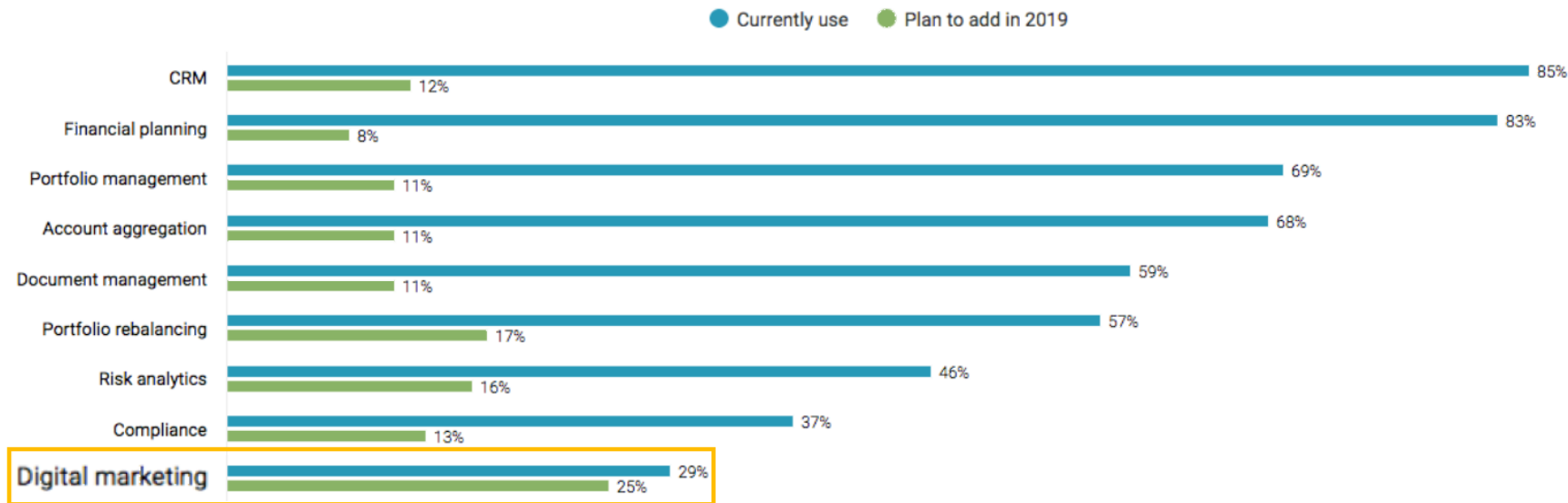


1. Client Communication Landscape
2. Digital Marketing Tools - Connect the Dots
3. Avoiding Digital Marketing Pitfalls

Advisor Tech Stack - Digital Marketing Growth

While less than a third (29%) of firms currently use stand-alone digital marketing technology, a quarter (25%) plan to add a solution soon. In fact, digital marketing is the top new solution that firms plan to add in 2019.

Fig. 1: Software solution usage (Select all that apply)



Source: 2019 InvestmentNews Adviser Technology Study

Engaged clients refer 5x more than disengaged clients

Vanguard: Driving Growth Through Client Referrals, 2019

An aerial photograph of a city skyline, likely New York City, with a heavy purple overlay. The image shows numerous skyscrapers and buildings, with a river visible in the background. The text is centered over the image.

92% of advisors that used social media in 2018
gained new clients

—Putnam Investments



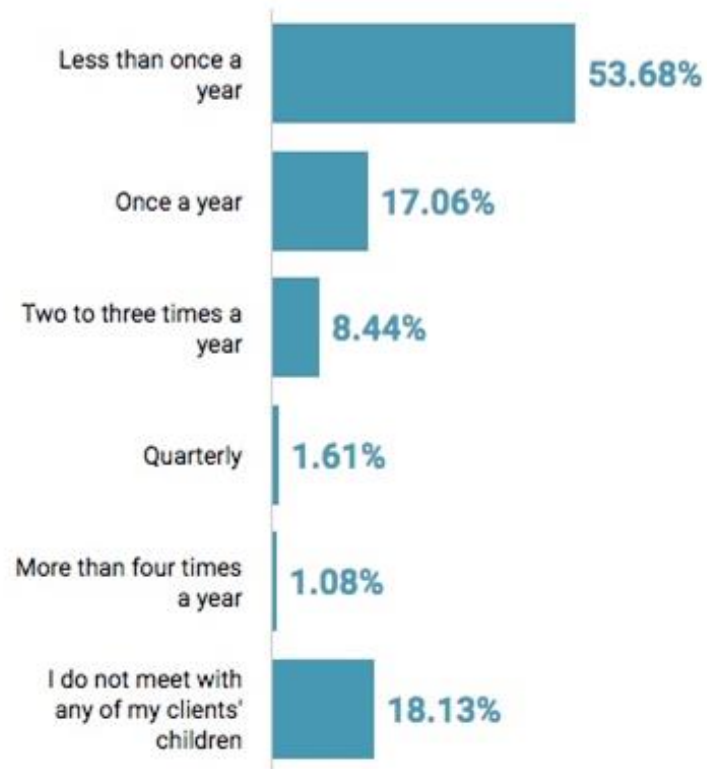
Client satisfaction increases by
30% when advisors use multiple
channels to communicate.

—Beddoes Institute: Connecting with Clients

— Investors on average receive 26 advisor touch points each year, and all age groups want more contact.

— Cerrulli: US Asset Management Edge

How Often Advisers Meet with Clients' Children?



Source: *InvestmentNews* Data

The Great Wealth Transfer



- Over the next 25 years, \$65 **trillion** will pass to the next generation
- Only 19% of clients have introduced their children to their advisor
- Only 2% of children stay with their parents' advisors
- Only 20% of advisors are targeting their clients' children

22% of people have ended a professional relationship due to irrelevant content

-Salesforce

Top 3 Reasons Client Leaves Advisor



-LinkedIn

40% of current clients are open to leaving their advisor and/or switching to other service providers

— Ernst & Young

Omni-Channel Strategy



Email Marketing is still a 40:1 return on investment compared to Social Media. It's key to use social media and websites to build your email marketing contact list.

—LinkedIn

“Investors use your website to pre-validate you, it’s a requirement today, it’s the equivalent of an office in the digital world.

You can drive many more visitors than to your brick and mortar office. You can **engage many visitors** at the same time—leveraging the one-to-many advantage of digital marketing. It’s critical to offer valuable content on your website that highlights you as an expert, and to ensure all content provides a method of capturing visitor info. You can then start to engage new leads consistently via email.”

“YOU MUST HAVE AN OPT-IN METHOD!”

— **Michael Kitces**, Financial Planner
MSFS, MTAX, CFP, CLU, ChFC, RHU, REBC, CASL



33% of clients have switched providers in the past three years, and another third plan to do so in the next three years

– Ernst & Young

You need to use credible sources like The New York Times,
Washington Post, Wall Street Journal when building high
network relationships

- Hubspot

What is Fair Use?

Why Use Licensed Content?

The Perils of Copyright Infringement

Definition of copyright infringement

"As a general matter, copyright infringement occurs when a copyrighted work is reproduced, distributed, performed, publicly displayed, or made into a derivative work without the permission of the copyright owner."

- Civil penalties of up to \$20,000 per infringement
- Criminal penalties of up to \$1,000,000

Look to Europe

- Directive on Copyright in the Digital Single Market
- OATS (Online Article Tracking System)
- The Publishers Association



Image Credits

Directive on Copyright in the Digital Single Market

- Protects press publications
- reduces the "value gap" between the profits made by Internet platforms and by content creators

What is OATS?




- Online Article Tracking System
- 400,000 offenses - **3,400 domains taken down** since 2014
- 90,000 offenses - **802 domains taken down** in 2018 alone

The Publisher's Association


- Copyright Infringement Portal
- An online system to enable publishers to easily identify online infringements, quickly send dmca (Digital Millennium Copyright Act) compliant takedown notices to infringing sites and to reliably collate takedown data
- Since 2009 - 4 million infringing links reported, 1.5 million Google search links removed

Lead Generation




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By submitting my contact information, I give my express consent to receive ongoing communications.

- Content is more likely to be shared when there is no risk of hitting a paywall
- Opt-ins can be controlled
- Thought leadership is promoted
- Competing calls to action are removed

Weekly E-newsletter



Time For A Financial Checkup

Hello Dave,

We all know that prevention is the best medicine when it comes to health. Eating well, exercising, and visiting our doctor regularly are key to a long, healthy life. But, when was the last time you checked your financial health?

April is a good time to take your financial vital signs. It seems exceptionally apropos as we just finished tax season which can be a reality check.

Let's take time to review the state of your current financial strategy, talk about your goals—short, long, and mid-term—to make sure your strategy is healthy. I can also provide you with financial health tips that can help keep your strategy on track as economic and market conditions evolve and change.

Please feel free to share these articles with your family and friends—they are excellent conversation starters.



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Knowing How Long You Will Live — and Live Healthy— Could Transform Retirement Planning

BARRON'S By Sarah Max
May 1, 2019

Selfies aren't the basis of most retirement planning, but Jay Olshansky, a leading researcher in longevity and a professor in the School of Public Health at the University of Illinois, thinks they should be.

"The face is a biomarker for the rate at which we age," says Olshansky, who helped develop technology for the insurance industry to analyze photographs for quotes and underwriting. "We can learn a lot more from a photo than you can imagine."



The two most crucial questions in retirement planning—how long are you likely to live, and how much of your life will be spent in relatively good health?—have long been dismissed as unknowable. But thanks to facial analysis, gene testing, and other new technology, advisors and investors may finally be able to get answers that meaningfully change the way they navigate saving for and living in retirement. And it has as much to do with your health as it does your portfolio.

Building Better Futures



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