

THE STATE OF MARKETING FOR Financial Advisors

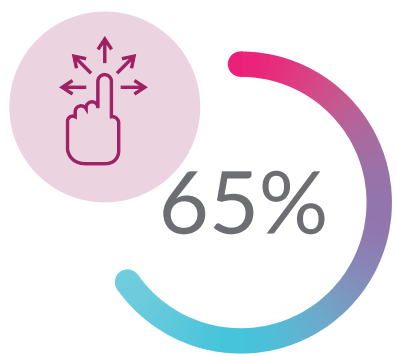
Over 450 financial professionals revealed their thoughts on marketing and client communications.

The results? Advisors want help with their marketing.

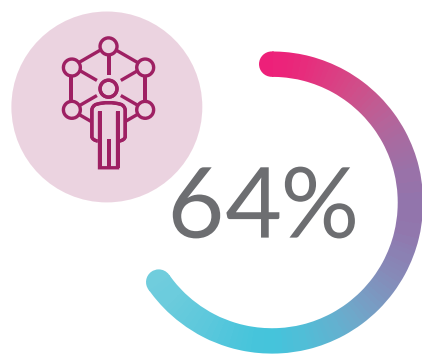
98%

agree that marketing and client communications are important to growing their business and retaining their clients.

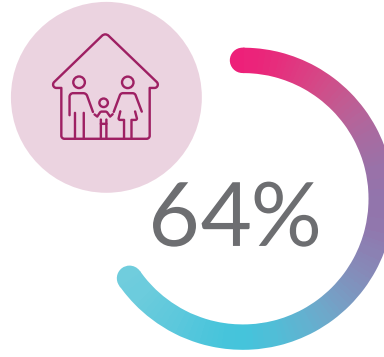
Advisors seek to use marketing & communications to:



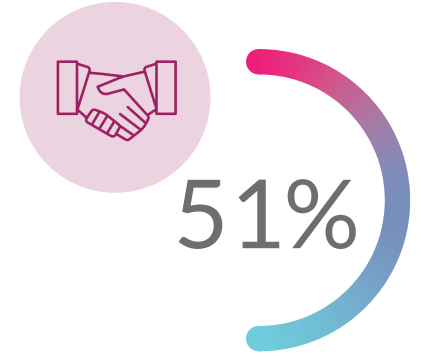
Expand their brand and digital presence



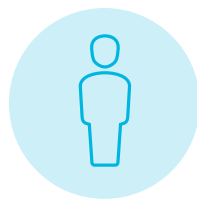
Expand their sphere of influence



Build relationships with their clients' immediate family members

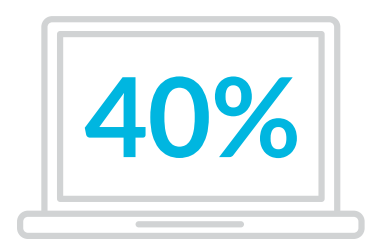


Engage with the next generation and millennials



MORE THAN HALF

admit **time**, **resources**, and creating and sourcing **content** are their greatest marketing challenges.



use more than 3 technology platforms to execute their marketing strategy, with a third using as many as 5.



\$5,000+

More than half spend \$5,000+ annually on their marketing technology.



86% reveal they need help improving their marketing abilities.

86%

If you can relate, don't worry.
eMoney can help!

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