

The State of Marketing & Client Communications for Financial Advisors



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

The results? >>>> Advisors want help with their marketing.

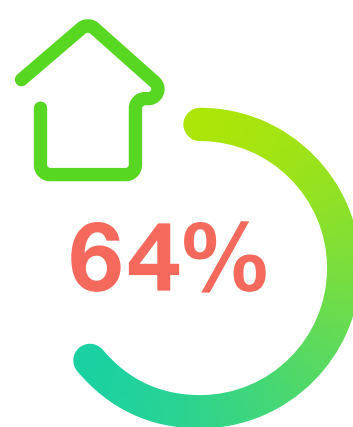
Advisors seek to use marketing and communications to



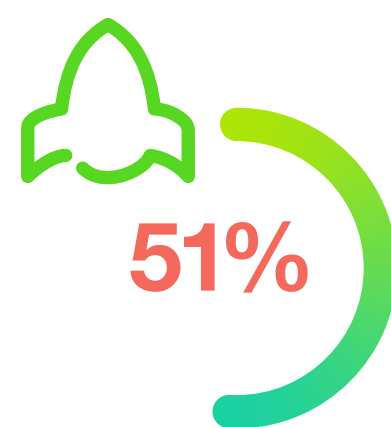
Expand their brand and digital presence



Expand their sphere of influence



Build relationships with their clients' immediate family members



Engage with the next generation and millennials

86%

reveal they need help improving their marketing abilities.

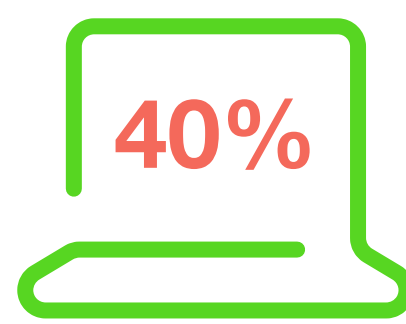
98%

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



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.



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



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