

The Digital Brand

How Financial Advisors

MARKET TO THE MODERN, INFORMED CLIENT

with
JEREMY FLOYD

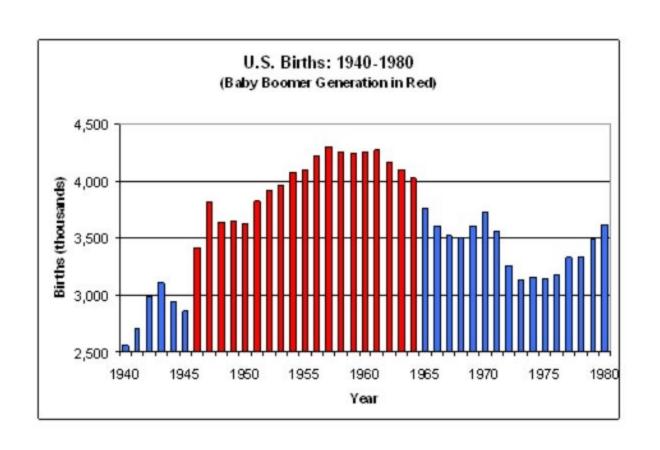
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TIMES THEY ARE A CHANGIN' Getting clients is more difficult

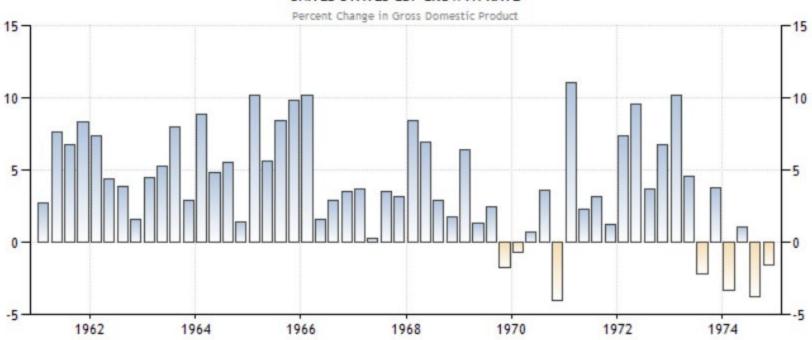


For This...



And This

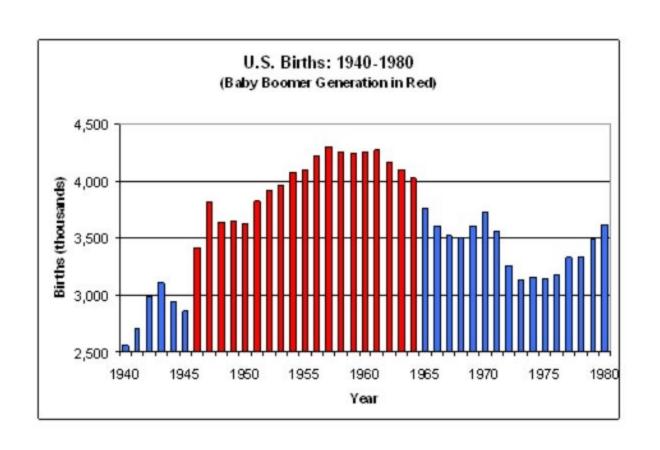
UNITED STATES GDP GROWTH RATE



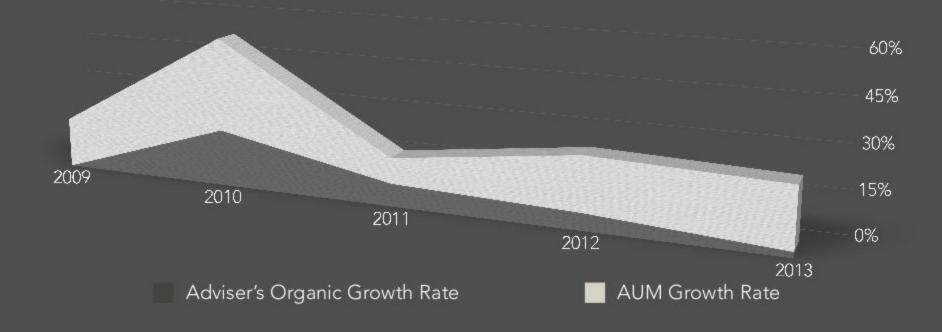
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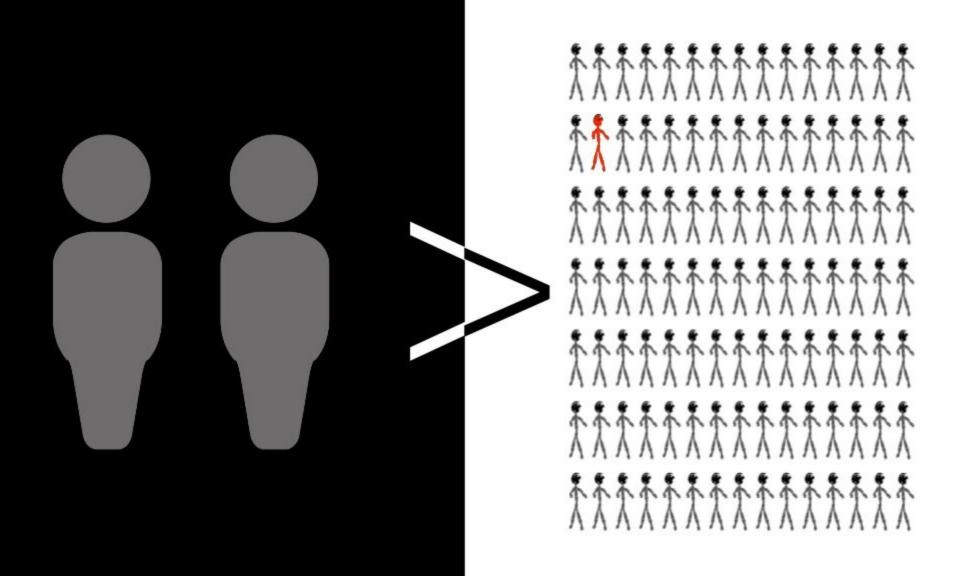
It's Swell, Then It's Not



FINANCIAL ADVISORS ARE FIGHTING MORE FOR LESS



EMPOWERED CONSUMERS: Search Engines and Social Media







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About 15,000,000 results (0.47 seconds)

financial adviser

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Financial adviser - Wikipedia, the free encyclopedia

en.wikipedia.org/wiki/Financial adviser * Wikipedia * A financial adviser (or advisor) is a professional who renders financial services to clients. According to the U.S. Financial Industry Regulatory Authority (FINRA), ...

Financial Advisor Job Overview | Best Jobs | US News ...

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Financial Advisors

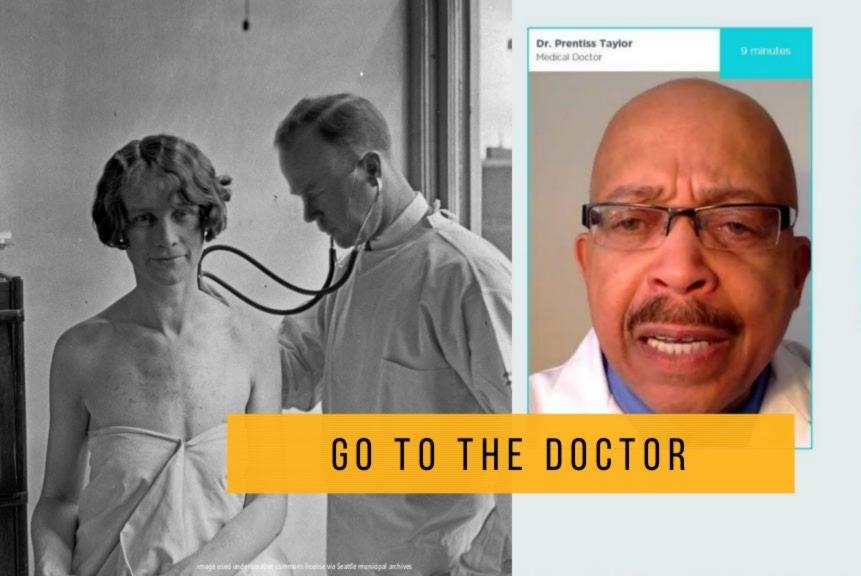
www.morganstanley.com/wealth * Find A Morgan Stanley Financial Advisor To Help With Your Future



13 of 13 people found the following review helpful **** A must-have gift for every wedding reception or graduation Most Recent Customer Rev By The Lion on August 1, 2014 ** Tour Stars Format: Kindle Edition Verified Purchase Good to know information on investing Very accessible and easy to read. Also (as with all Dummies books), you don't have to read from cover-to-cover. It's designed for you to be able to Published 1 day ago by Greg flip around to get the sections you really want to know more about. This should be a gift at every wedding reception, graduation, birthday, etc. (Just make sure to tell the person(s) you're giving it to that you don't actually think that they're "Dummies!"). ** * * Five Stars Was this review helpful to you? Yes No Comment love it Published 2 days ago by Tenita W. 5 of 5 people found the following review helpful *** Five Stars ★常食食食 Have learned some good tips from this book Easy to understand, perfect for a beg By Bobbie T. on August 8, 2014 interested the whole way through. Format: Paperback Verified Purchase Published 4 days ago by michael Have learned some good tips from this book. You do not have to read it in chronological order. You can also to coations that interest you the most *** ike it. Comment Was this review helpful to y AND THEY'RE CONNECTED Good basic information. Published 15 days ago by Lois Jones 4 of 4 people found the following review helpt ** ** * Great Book for the Novice Two Stars By Astara on September 29, 2014 too simplistic Published 21 days ago by robert loeb III This book is a must read for young people just starting their adult life, or for a person who just wants to know more about how to handle their own Three Stars finances. It covers the basics well and even has illustrations to show how investments fair over time. Still didnt make it easy, or maybe inte Comment Was this review helpful to you? Yes No Published 24 days ago by Spokes *** Five Stars 3 of 3 people found the following review helpful My 17 year old son found it very infor-Published 25 days ago by Tara Howe-Bo By Mike Morgenstein on January 5, 2015 Format: Paperback *** Four Stars I'm confounded by claims of other reviewers that they don't understand the book. 'Investing' within itself is a very broad topic with a plethora of A lot to read and still didn't understan subfields. Each of which can have an entire "for dummies" book written for within itself. Author Eric Tyson has to write within sustainable limits (in Published 1 month ago by Frances M. R this case, 380 pages), which I believe he did very well. Many subfields of investing may be eccentric and complicated, but its very hard to elucidate









End visit



INBOUND MARKETING Why market digitally?

"If you don't tell your story, someone will."

-AMY HOWELL, AUTHOR WOMEN IN HIGH GEAR

VIDEO SLIDESHARE CONTENT YOUR WEBSITE IS YOUR TOP SALESPERSON **TWITTER** LINKEDIN PODCAST



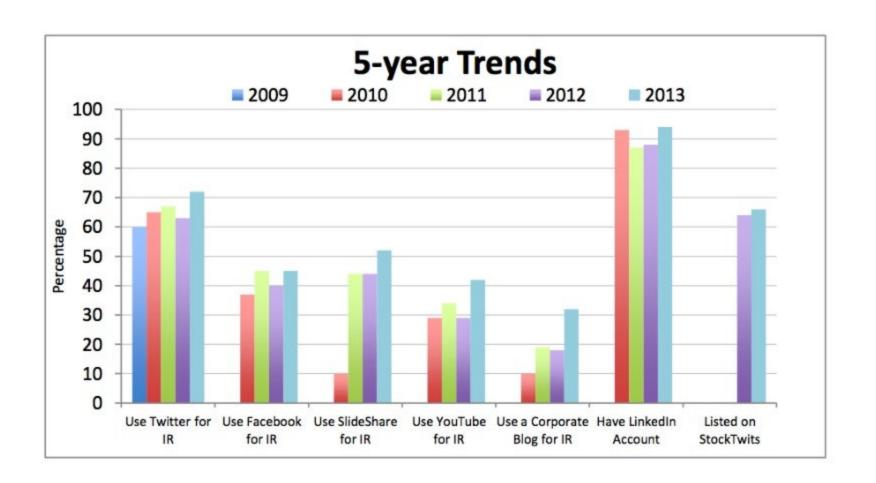
The Long Tail



LOW COMPETITION



Google and Shopper Sciences partnered to reveal the Zero Moments of Truth for the financial investment category and found that consumers research for two weeks or longer seeking an average of 8.9 sources of information



The Marketing Hourglasssm

Know

- ·Who and how
- •Ads
- •Referrals

Like

- ·Web site/blog
- Reception
- Newsletter

Trust

- Search
- •Expert content
- Sales presentation

Try

- •Webinar
- Evaluation
- •Nurturing

Buy

- Service team
- ·New customer kit
- ·Finance/delivery

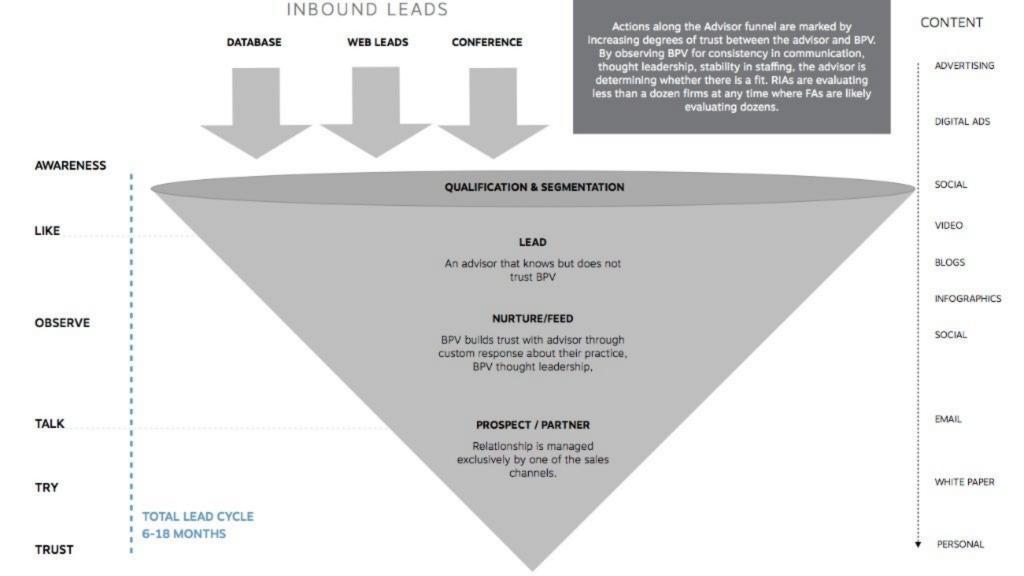
Repeat

- Post project survey
- •Cross selling
- Quarterly events

Refer

- Results reviews
- Partner intros
- Peer2peer events





INBOUND MARKETING What defines you?

THE WORLD

PROMISE

PURPOSE

VALUES

The Brand Iceberg

Building Back Porch Vista's Brand





OUR VALUES

We care about our shareholders.

We do the right thing, in spite of the noise.

We never let up.

We ask why.

We get there together.

OUR PURPOSE

We believe you should retire well.







BPV 5

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Recent News

A BPV Enchange Designing TO ADVISE ATHLETES. think like a coach.

WHAT THE POLL TRANSCRIPT

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Investing) with Courage (\$20,000.4) News Sentine's Mike West on Celebrity Managers 001820847







Reach to New York City

Acquires Skyview:

Weekly Market Insights

August Snapshot

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BPVM

ACCOUNT ACCOUNTS

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COMMENTS OFF

ENDKVILLE, TN - December 10, 2014-BPV Capital Management, advisor to the and funds, arrounced locky

News Sentinel: Mike West on Aging (and Investing) with Courage

@ Decamber 1, 2014

Foregage Certaint, News

DOM: 15. 2014 -



INVEST LOCAL

Sit Back. We'll Take Care of It.

LIKEYOU, WE'VE DECIDED TO PLANT OUR ROOTS IN EAST TENNESSEE.

MAGNEN THERWISE TO BE THE COURT OF ACT MUTUAL SECUNDOR EASED IN EAST TENNETHER

IMES LIKE THIS MAKE T ALL WORTHWHILE

WHAT'S YOUR VISTA?

Bombastic boasts

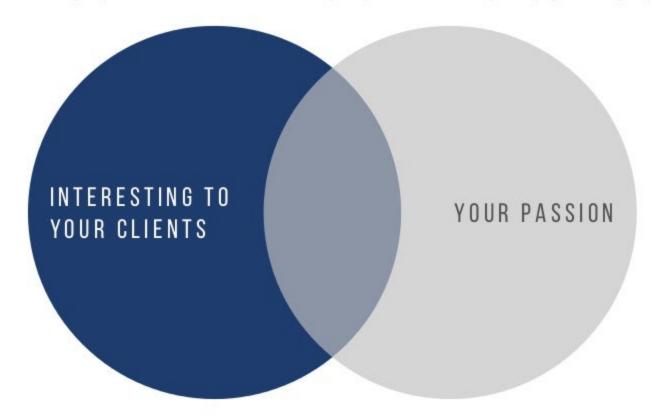
-"We are positioned to become the preeminent provider of XYZ" -do not constitute a position.

THESIS 24, CLUETRAIN MANIFESTO



Define your voice.

THE VOICE THAT INTERESTS THEM IS YOUR VOICE



INBOUND MARKETING Who are you talking to?

"The aim of marketing is to know and understand the customer so well the product or service fits him and sells itself."

-PETER DRUCKER

Tip no. 1: Line them up. LIST COMMON CHARACTERISTICS OF YOUR BEST CLIENTS

- 01 WHAT ARE THEIR HOBBIES?
- 02 HOW OLD ARE THEY?
- 03 WHERE DO THEY LIKE TO VACATION?

Tip no. 2: Observe your clients. DON'T OUTSOURCE THE IMPORTANT STUFF

- 01 HOW DO THEY MAKE COMPLEX DECISIONS?
- HOW DO THEY DESCRIBE YOU TO SOMEONE ELSE?
- WHAT CONCERNS THEM MOST ABOUT MAKING A POOR FINANCIAL DECISION?
- 03 WHY DO THEY THINK YOU ARE THEIR ADVISOR?

Tip no. 3: Build a buyer persona.

DEFINE AN IDEAL CLIENT

OBJECTIVES

What is this person trying to accomplish and how are we uniquely positioned to help her?

QUOTES

What are some real quotes collected from client interviews?

LIFE STORY

Where did they go to school? How many kids? What do they enjoy?



WHY WE MATTER

Why do they "really" do business with us?

PERSONALITY

Are they analytical, spontaneous, enthusiastic, irrational?

BASIC DEMOGRAPHICS

What is the age, sex, income, marital status of your ideal client?

INBOUND MARKETING What will you talk about?

"People weren't as interested in hard-core, financial planning content as they were... day to day lifestyle content."

-TED JENKIN, OXYGEN FINANCIAL INC.



ENGAGE



"Speak Human."

-ANN HANDLEY, CONTENT RULES

EARN TRUST

WITH EVERY INTERACTION, YOU ARE WHAT YOU SAY & WHAT YOU SHARE



BE INTERESTING

INBOUND MARKETING Where will you engage?

"Instead of one-way interruption, Web marketing is about delivering useful content at just the precise moment that a buyer needs it." -

DAVID MEERMAN SCOTT

Maximize Each Piece Of Content













HTML

TEXT MESSAGE - SMS

Podcast





Tesponsive Web



The Ecosystem Of **Advising Athletes**





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Have a great day!

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He - German - Persons - marriage

BPV Capital Vanagement is built on the simple belief that all investors deserve individual should have the ability to achieve his or her own back gordy visus thru exclusion from tamily office, to achieve, and finally to a tamily of funds, we've say



BPV Special Report



Plan Ahead

To recap...

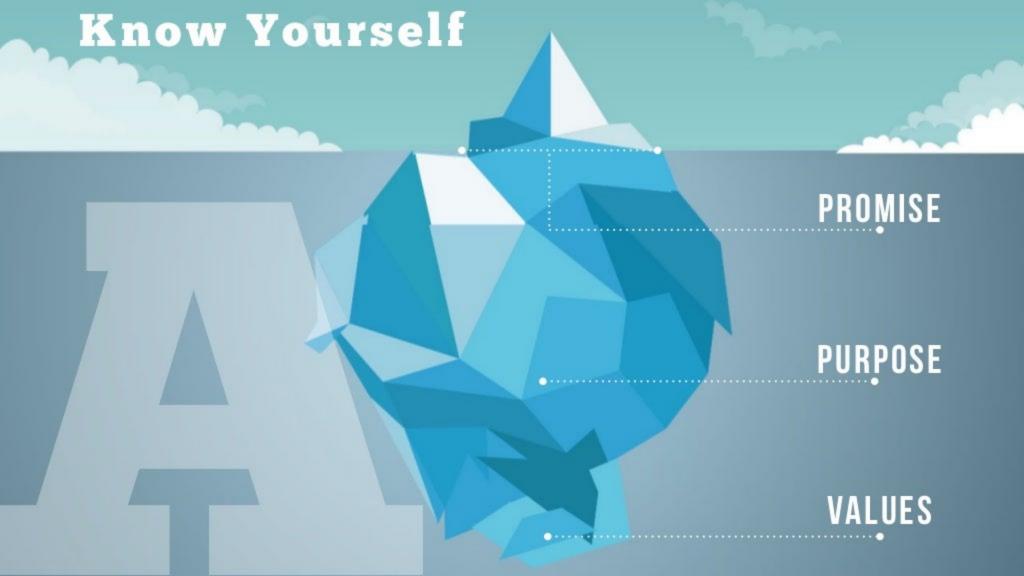


INBOUND MARKETING is in.

KNOWING WHO YOU ARE AND WHO YOU AREN'T, MAKES YOU,

MOUS

BEING ABLE TO COMMUNICATE WHO YOU ARE IS YOUR BRAND.



Know Your Client



BUILD A BUYER PERSONA



BE RELEVANT



BE HUMAN
BE ENGAGING
EARN TRUST
BE FUN & INTERESTING

Distribute Content Appropriately

Linked in







IDEA eca SYSTEM

mare out of less



TEXT MESSAGE - SMS

Podcast



HTML

5 Responsive Web



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Request The Survival Guide

Financial Advisor's Survival Guide to

HTTP://BIT.LY/FLOYD-BPV

HTTP://BIT.LY/FA-SURVIVAL-GUIDE

RECOMMENDED READING

- New Rules of Sales and Customer Service, David Meerman Scott
- Start with Why Simon Sinek
- Power of Why Richard Weylman
- Content Rules Ann Handley
- Anything Seth Godin
- Duct Tape Marketing John Jantsch



The Digital Brand

How Financial Advisors

MARKET TO THE MODERN, INFORMED CLIENT

JANNEY MONTGOMERY SCOTT ELITE CONFERENCE

January 15, 2015

with
JEREMY FLOYD