



## Trusted by Advisors Chosen by Families

Providing independent administrative trustee services to our clients all across this great nation.

# Using Content to Differentiate Yourself from Other Advisors

As a seasoned financial advisor, you have achieved a level of expertise from your years of experience in the industry. Unfortunately, from a prospective client's perspective, every other financial advisor has too. Prospects tend to think that all financial advisors are the same having the same knowledge base, the same level of experience and providing the same services. So what would motivate a client to work with you instead of another advisor?

The ability to showcase and publish your thoughts and expert insights is quickly becoming imperative for financial advisors who want to stand out from the crowd, especially in this digital age. The goal of creating and sharing meaningful content is to create an identity for yourself and your firm and build relationships with your leads and prospects.

In our last paper we talked about how to create a value proposition to which high net worth clients would respond. In this paper we discuss how you can differentiate yourself by sharing your expertise and value proposition with both clients and prospects.

We talk to a lot of financial advisors. Most of them would rather make cold calls than have to come up with original informative content.

Even though it sounds daunting, content creation can be a lot easier than cold calling and much more effective in attracting new clients. Prospects want to get to know you, and the only way you can do that in a scalable way is to create and disseminate content that reflects your area of expertise and your view of the financial world.

One myth that plagues many advisors is thinking that all of the content they share has to be original. We suggest a 60/40 split between your original articles and sharing content generated by other professionals. As long as you quote the source of the article and add a few sentences before the piece to help your clients understand your views and the importance of the article, you should feel free to share other peoples' articles in your blog, website, and newsletter.

Check out our library of articles [here](#), which you can use to help clients learn more about the benefits of a trust in their estate planning process. You may also want to consider writing a response to someone else's article. An example would be writing a review on a finance book that you think clients could benefit from. Or, you can create list-type content. For example you could create a list of the top ten financial sites you trust or a list of summer reading books you recommend.

When creating original content try these 10 ideas/tips to make it easier:

1. Set aside half an hour each week to brainstorm ideas. This time can be spent with colleagues so you can brainstorm together, or on your own.
2. Set aside 30 minutes each week to write an article. By scheduling time each week you can remain disciplined about creating content on a regular basis. By limiting the time to 30 minutes you can avoid getting frustrated with a topic and over thinking the article.



3. Limit your articles to 300-500 words. Shorter articles are easier for people to digest and if they have questions it's a great reason for them to call or email you to follow up.
4. Whenever you read an interesting article or book, scan and save it in a folder on your computer to help you create ideas for your own articles.
5. Use your clients' questions as a basis for your content. Use their questions as an opportunity to communicate your insights to all of your clients and prospects.
6. Don't limit yourself to writing. If you find it easier to talk rather than write try creating a short video to help get your expertise across to clients. We do it all the time. Check out this video for example. [Link to most interesting man advisor video, or to new videos]
7. If you focus on a particular target market, like attorneys or business owners, focus on issues that are important to them. Content focused on taxation, regulations, market trends, and even business management, are constantly at the forefront for these clients. Use your content as an opportunity to establish yourself as an authority on their issues and concerns. When they see that you clearly understand their problems, they will come to you for help solving them.
8. Take the time to come up with a compelling title. Put yourself in your prospects shoes for a moment. Think about how you decide what to read with so much content in publications and online these days. Chances are you make the determination based on the title of the article or video. You can write an article, but if your title doesn't inspire readers, odds are they won't read it.
9. Let your personality shine through. Prospects are interested in learning more about what it's like to work with you and there's no better way to give them a sneak peek. Let them get to know you by using the same tone you'd use to speak with them in person. Above all, make sure your content reflects your true personality.
10. Tell them what you want them to do next: add a call to action. The main purpose of your content is to provide value and engage your audience. One way to engage them is with a call to action such as "leave a comment", or "download our special report", or "contact me with questions". The more you can engage your audience, the more likely the relationships will end up leading to additional business and referrals.

Now that you have created your content, let's talk about ways to get it in front of your target audience. Here is a list to consider:

- Post the content on your blog or in your content library on your website
- Submit your articles to blogs or other sites that your target audience visits
- Use your content to host a webinar on your own or with someone in your referral network such as an attorney or CPA. Make sure you both market the event to all of your contacts
- Transform your article into a case study
- Include your content in your newsletters
- Use your content to create a chart or an infographic
- Post your content in a video on YouTube
- Social media: don't be afraid to post your content to your social media accounts such as LinkedIn groups, as a Twitter post or as a Facebook update.

Most of all, have fun and enjoy the prospecting!