



The Advisor's Guide to building an online presence, creating quality content, and leveraging email marketing.

This Digital Marketing Guide was designed for Canadian Financial Advisors, Planners, and Investment Managers who want to grow their firms by building an online presence.

This Marketing Guide has been created to provide Financial Advisors & Planners with the foundational knowledge needed to build an online presence, create and share valuable content, and engage with prospects and clients through email marketing.

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Chapter 1: Introduction

Let's get started!

Understanding the importance of marketing, target audience, and setting clear goals.

Understanding the Importance of Marketing

As a Canadian Financial Advisor, Planner, or Investment Manager, it's crucial to recognize the significance of effective marketing in growing your practice. In this guide, we'll discuss the fundamentals of marketing and why it's essential for your success in the industry.

This guide is hyper-focused on the Canadian market and applies to Advisors specifically. Lessons, strategies, tips and ideas are not generalized but tailored to you, the Financial Advisor who wants to grow their practice in a sustainable way.

Target Audience

Identifying your target audience is the first step in creating a successful marketing plan. We will cover how to define your ideal clients and understand their needs and preferences.

Setting Clear Goals

Clearly defined goals are the foundation of any marketing plan. We'll guide you through the process of setting specific, measurable, achievable, relevant, and time-bound (SMART) goals for your practice.

How to segment your target audience:

Target audience segmentation involves dividing the larger audience into smaller, more specific groups, known as segments, based on shared characteristics and needs. This approach allows Advisors to tailor their marketing efforts and services to the unique requirements of each segment, making marketing more effective and relevant.

Here are some key aspects to understand about target audience segmentation:

Demographics: This includes age, gender, marital status, income level, occupation, and location. For example, Advisors might target segments like "high-net-worth retirees in Ontario" or "young professionals in British Columbia."

Psychographics: Understanding the psychological characteristics of your clients is important. This involves looking at their values, attitudes, lifestyle, and personality traits. For instance, an Advisor may target segments such as "ethically conscious investors" or "risk-averse retirees."

Financial Parameters: Advisors need to consider their clients' financial situations, including net worth, investment goals, risk tolerance, and investment timeline. For example, segments might include "long-term investors seeking growth" or "income-focused investors close to retirement."

Life Stages: The financial needs and goals of individuals change as they move through life stages. Advisors should consider segments like "young professionals starting to invest" or "empty nesters preparing for retirement."

Education and Knowledge Level: Some clients may have a deep understanding of financial matters, while others may be more financially literate. Segments might include "experienced investors" or "financial novices."

Specific Needs or Goals: Targeting segments with specific financial needs, such as "education savings for children" or "estate planning," can be highly effective.

Risk Profile: Assessing the risk tolerance of clients is essential for creating appropriate investment strategies. Segments can be defined as "conservative investors" or "aggressive investors."

Communication Preferences: Different segments may prefer different communication channels, such as email, phone calls, or in-person meetings. Understanding these preferences helps Advisors tailor their outreach.

You will want to review your existing client list to determine which segments you're serving, and also decide which segment you'd like to serve — who are your ideal clients? Marketing should be tailored to attracting your ideal clients.

In Chapter 2, we will dig deeper into how to define your target market and create your first Buyer Persona.

How to set clear goals:

Setting goals is crucial for the success of any marketing strategy. There are numerous goal-setting strategies out there, but the SMART goals process works very well for Advisors.

Here's a step-by-step process to help you create SMART marketing goals:

(S) Specific

Clearly define what you want to achieve. For example, rather than a vague goal like "increase client base," be specific, such as "acquire 20 new high-net-worth clients in the next quarter."

(M) Measurable

Establish criteria for measuring progress and success. Identify key performance indicators (KPIs) that can be quantified, such as website traffic, lead conversions, or social media engagement. For instance, "Increase website traffic by 30% in the next six months."

(A) Achievable

Ensure that your goals are realistic and attainable. Consider your resources, budget, and current capabilities. Setting a goal to "double client assets in one month" might not be realistic, but "increase assets under management by 15% in the next year" could be achievable.

(R) Relevant

Align your goals with the overall business objectives and the current market environment. Goals should contribute to the growth and success of the Financial Advisory practice. For example, if your firm is focused on retirement planning, set goals related to expanding services in that area.

(T) Time-Bound

Set a specific timeframe for achieving your goals. This adds a sense of urgency and helps you stay focused. Instead of saying "increase social media followers," say "increase social media followers by 20% within the next three months."

Putting it all together, an example of a SMART marketing goal for Financial Advisors could be:

"Acquire 5 new high-net-worth clients in the next quarter by implementing a targeted digital marketing campaign, increasing website traffic by 30%, and converting at least 5% of the leads generated through the campaign. This goal aligns with our overall business objective of expanding our client base and is measurable, achievable, relevant, and time-bound."

Regularly review and adjust your goals based on performance and changes in the business environment to ensure ongoing success. A theme throughout this guide is going to be keeping it simple and actionable, so try not to get overwhelmed with the sheer volume of information provided throughout the Guide. We will highlight what the basic starting points are, and also mention what elements are more advanced and for down the road.

This methodology can be applied to setting your marketing goals as well. You can still set a SMART goal that is more basic if that makes sense for your practice as you're just getting started. To do this, focus on the smaller steps within your overall strategy that will get you closer to your end goal. You can have small steps (goals) along the way that will move you toward achieving your end goal.

For example, your first goal may be to build a website or collect email addresses to start your email marketing campaign. These goals should still be SMART, even though they are more bite-sized.

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Chapter 2: Branding and Positioning

Crafting your unique value proposition, building a strong brand, defining your target market, and creating your first Buyer Persona.

Crafting Your Unique Value Proposition

Developing a compelling value proposition is crucial for Advisors to differentiate themselves and attract their ideal clients. A value proposition communicates the unique value and benefits you, the Financial Advisor or Planner, can offer to clients. In a service-based industry that depends entirely on trust, it's extremely important to articulate your value.

Here is the process to developing your unique value proposition:

Understand your target audience

Identify and understand the needs, preferences, and pain points of your target clients. Knowing your audience allows you to tailor your value proposition to address their specific concerns and desires.

Define your unique selling proposition

Determine what sets you apart from other Financial Advisors. This could be a unique skill set, a specialized area of expertise, a particular approach to financial planning, or any distinctive feature that makes you stand out.

Highlight your expertise

Clearly communicate your qualifications, certifications, and experience. Make sure your clients know why they should trust you with their financial matters. Highlight any specialized training, industry recognition, or unique experiences that demonstrate your expertise.

Focus on client benefits

Instead of just listing your services, emphasize the tangible benefits your clients will gain from working with you. Consider the emotional and practical aspects of your services and how they positively impact your clients' lives.

[This is a great resource on how Financial Advisors can articulate and demonstrate the different ways they can add value to their clients' lives.](#)

Offer a Solution to a Problem

Identify common challenges or pain points your target audience faces and position your services as a solution. This helps clients see the practical value in choosing you as their Financial Advisor.

Communicate Your Process

Clearly outline the steps and processes you follow when working with clients. This transparency builds trust and helps potential clients understand what to expect from your services.

If you don't have a clear and concise financial planning process in place, [here is a one-hour tutorial on how to create one.](#)

Use Clear and Compelling Language

Craft your value proposition using language that is clear, concise, and easy to understand. Avoid jargon or technical terms that may confuse potential clients. Focus on simplicity and clarity.

Showcase Testimonials or Success Stories

If you have satisfied clients, feature their testimonials or success stories to provide real-world examples of the value you bring. This adds credibility and builds trust with prospective clients.

Continuously Refine and Update

Your value proposition should evolve as your business grows and as the industry landscape changes. Regularly review and update your value proposition to ensure it remains relevant and compelling.

Remember, a strong value proposition is an ongoing effort that requires regular review and adjustment to stay aligned with your clients' evolving needs and the competitive landscape.

Here is an example of a unique value proposition statement:

For this firm, comprehensive, long-term, financial wellness partnerships are the focus.

"At [your firm's name], we go beyond traditional financial planning. We believe in building long-term partnerships focused on your complete financial well-being. Our approach combines personalized investment strategies, in-depth retirement planning, and a commitment to financial education. As your dedicated financial partner, we empower you to make informed decisions, navigate life transitions, and achieve your unique financial goals. Discover the difference of a comprehensive financial wellness partnership with [your firm's name]."

Building a Strong Brand

Establishing a professional and trustworthy brand identity that resonates with your target market is an important aspect of branding. It is something that will develop over time as you build your reputation and become more well-known.

Branding encompasses how you are perceived in the eyes of your clients and prospects. It's not just about a logo or a catchy slogan; it's about your overall image and reputation as a Financial Advisor or Planner.

A well-defined brand should convey:

- Values and mission: What the Advisor stands for and the principles they uphold.
- Unique value proposition: What sets the Advisor apart from others in the industry.
- Visual identity: This includes logos, color schemes, and design elements.
- Consistency: Ensuring that the brand is consistently applied across all marketing materials.

We covered the first two points previously with your example of a unique value proposition. We are not going to spend time on the visual identity component, as this is decided for many of you by your dealers and affiliations. If you need support in this department, a graphic design agency in your area is typically a great place to start for a branding kit. You can also create a logo yourself using a program like Canva, or access online platforms like Upwork or Fiverr for an inexpensive logo design by a professional.

Defining Your Target Market

Defining a target market is a crucial step for Advisors to effectively tailor their services, marketing strategies, and communication to attract the right clients.

We've already covered different ways to segment your audience in Chapter 1. The next step will be to determine **who** you will target. To keep things simple and remove barriers to moving forward, your own current areas of

expertise are often the low-hanging fruit when it comes to quickly adding value. This is your first step below and a great place to start. As you progress, you can work through the additional steps to expand.

Here is how to define your target market:

Conduct a self-assessment

Start by assessing your own strengths, expertise, and interests. Consider your qualifications, experience, and any specialized knowledge you possess. Identify the areas where you can offer the most value to clients.

Identify your niche

Determine if there's a specific niche or industry segment that aligns with your expertise and interests. This could be retirees, business owners, professionals in a specific field, or individuals with specific financial needs. Focusing on a niche can help you stand out and become an expert in that area.

Research the demographics

Understand the demographic characteristics of your ideal clients. Consider factors such as age, income, occupation, education level, and family status. This information helps you tailor your services and marketing messages to resonate with your target audience.

Assess psychographics

Explore the psychographic aspects of your target market, including their values, attitudes, behaviors, and lifestyle. Understanding these factors can help you connect with clients on a deeper level and build stronger relationships.

Examine financial behaviors

Analyze the financial behaviors and attitudes of your target audience. Consider their risk tolerance, investment preferences, and financial goals. This information is crucial for tailoring your financial planning and Advisory services to meet their specific needs.

Consider geographic location

Determine if the geographic location plays a role in defining your target market. Some Advisors prefer to focus on a specific region or community where they have local expertise or connections, but in today's digital world, that is no longer necessary.

Evaluate competitor focus

Analyze the market to understand the focus of other Financial Advisors and identify gaps or underserved segments. This can help you position yourself uniquely within the market.

Client compatibility

Consider the types of clients you enjoy working with and have been successful in serving in the past. Assess the compatibility between your working style and the preferences of your target market.

Review existing client base

Evaluate your current client base to identify patterns or commonalities among your most satisfied and loyal clients. This can provide insights into the types of clients you naturally attract and serve well.

Refine and test

Refine your target market definition as needed based on ongoing feedback and market changes. Consider testing your approach with a smaller segment of your marketing efforts before scaling it up.

By carefully defining your target market, you can create more effective marketing strategies, enhance client relationships, and build a reputation as a specialist in serving the specific needs of your chosen clientele.

How to create a Buyer Persona

Creating Buyer Personas is a valuable exercise for Advisors and Planners to better understand and tailor their services to the needs and preferences of their target clients. They are also a great resource for your team to ensure everyone is on the same page and crystal clear about who the firm wants (and does not want!) to target. Everything you do in your marketing should tie back to these Personas.

Here is how to create your first one:

Define your target market

Start by identifying the overarching characteristics of your ideal client base. Consider demographics such as age, income level, occupation, and geographic location. This will serve as the foundation for your Buyer Persona.

Conduct market research

Gather data on your target market through market research. Use surveys, interviews, and other research methods to collect information about your audience's financial goals, challenges, values, and preferences. This can be done as easily as sending an email with a few questions out to your current and/or preferred clients.

Segment your audience

Divide your target market into distinct segments based on common characteristics. For example, you might have different Buyer Personas for young professionals, families with children, or retirees.

Identify pain points and goals

Understand the specific financial challenges and goals that your target audience faces. What are their pain points, and what are they trying to achieve? This information will help you tailor your services to address their unique needs.

Consider financial behaviors

Explore the financial behaviors of your target audience. This includes their attitudes toward risk, investment preferences, savings habits, and other financial decision-making factors.

Evaluate communication preferences

Determine how your target audience prefers to receive information and communicate. Some clients may prefer in-person meetings, while others may be more comfortable with digital communication channels. Adjust your communication strategies accordingly.

Create persona profiles

Develop detailed persona profiles for each segment of your target market. Give each persona a name and include information such as age, occupation, financial goals, challenges, and preferred communication channels. Be as specific and detailed as possible.

Include personal details

Incorporate personal details into your personas to make them more relatable. Consider factors such as hobbies, interests, and lifestyle choices that might influence their financial decisions.

Use real stories or testimonials

If possible, include real stories or testimonials from clients who fit your personas. This adds authenticity and helps you better understand how your services can positively impact individuals in each segment.

Refine Over Time

Buyer Personas should be dynamic and evolve over time. Regularly review and update your personas based on new insights, changing market conditions, and feedback from clients.

By creating detailed Buyer Personas, Advisors can align their services, marketing messages, and communication strategies with the specific needs and preferences of their target audience. This personalized approach enhances client relationships and increases the effectiveness of marketing efforts.

Buyer Persona

Name:

Age:

Gender:

Occupation:

Personality:

Location:

Marital Status:

Dependants:

Education:

Annual Income:

What are their interests, hobbies, and lifestyle choices? What do they spend their time doing?

What are their financial behaviours, challenges, and beliefs?

What are their short-term and long-term goals, both financially and personally?

What do they struggle with? What do they want to change? What keeps them up at night?

Advisors can start a 14-day Free Trial of Snap Projections [here](#). It's transparent, easy to use, and highly flexible financial planning software.

Chapter 3: Online Presence & Lead Generation

Online Presence

In today's digital world, an online presence is essential for connecting with potential clients and staying visible in the marketplace. In addition to having an online presence, we also want to think about lead generation. Many of these concepts and strategies are going to overlap but we will attempt to segment them as appropriate to keep the chapters and sections focused and concise.

In this chapter, we will cover having an online presence and lead generation, which includes websites, Search Engine Optimization, having a social media presence, and how to get started with paid ads.

Chapter 4 will be devoted to content and email marketing.

An effective online presence includes:

- Professional Website: A well-designed, informative website that showcases your services, expertise, and client testimonials.
- Social Media: Active and engaging social media profiles on platforms like LinkedIn, Twitter, and Facebook to connect with clients and share valuable content.

- **Content Marketing:** Regularly creating and sharing informative content, such as blogs, articles, videos, and infographics, to position yourself as an industry expert.
- **Search Engine Optimization (SEO):** Optimizing the website and content for search engines to improve visibility in search results.
- **Email Marketing:** Building and nurturing an email list to provide value and education, as well as stay in touch with both clients and prospects
- **Online Reputation Management:** Managing online reviews and ensuring a positive online reputation.

Lead Generation Strategies

Lead generation strategies involve identifying and attracting potential clients who have expressed interest in financial services or who fit the profile of your ideal client.

This topic casts a very wide net of options and strategies:

Content Marketing: Creating and sharing valuable content, such as blog posts, articles, webinars, and videos, that educates and informs potential clients. This content can be optimized for search engines to attract organic traffic to the advisor's website.

Social Media Marketing: Engaging with potential clients on social media platforms like LinkedIn, Twitter, and Facebook. Advisors can share content, participate in discussions, and build relationships with their audience.

Email Marketing: Building and nurturing an email list of potential clients.

Advisors can send out newsletters, educational content, and updates about their services to keep current and potential clients engaged.

Search Engine Optimization (SEO): Optimizing the advisor's website and online content for search engines. This increases the likelihood of appearing in search results when potential clients search for financial services.

Pay-Per-Click (PPC) Advertising: Running paid advertising campaigns on search engines and social media platforms to target specific keywords and demographics.

Referral Marketing: Encouraging satisfied clients to refer their friends and family to the advisor's services.

Networking and Events: Attending industry events, conferences, and local networking groups to meet potential clients in person.

Webinars and Workshops: Hosting online webinars or in-person workshops on financial topics to attract potential clients interested in learning more.

Lead Magnets: Creating valuable resources, such as ebooks, guides, or templates, that are offered in exchange for a potential client's contact information.

Online Advertising: Placing banner ads or sponsored content on relevant websites and online publications.

Community Involvement: Participating in community events, charitable activities, and educational initiatives to build trust and awareness.

Client Seminars: Hosting educational seminars for potential clients on financial topics of interest.

In this guide, we are going to attempt to dig into each one of these.

Websites

Your website is often the first point of contact for potential clients. While it's always better to have your own website (so you own the content and rights to it) it's not always possible based on the requirements of your dealer or associations. Some Advisors opt to have their own websites, while others will rely on landing pages provided by their dealers.

You can also use your LinkedIn profile if necessary. The important part is to have a public, dedicated page online where prospects can learn about you and view your unique value proposition. Long term, the goal will become growing your online traffic and getting those viewers onto your email list. We will cover that process in-depth in Chapter 4.

In Chapter 4, when we discuss blogging and growing an email list, you can make substitutions if you are unable to have your own website.

If you cannot have your own website:

- If your dealer provides you with a landing page, can you add a blog? If so, great. You may be able to create a blog and opt-in for your email list on this.
- If not, use your LinkedIn profile. You can create articles right on the platform and there are plenty of lead-capturing features.

At the end of the day, it's important to consider the ownership of your content and opt-ins. That is why an email list is so powerful — because it's yours. When you build content on something that doesn't belong to you, there is always a risk of losing it. If possible, you always want to have your own site with a domain and blog that you retain ownership of.

If you are ready to tackle building a basic website on your own, here are the steps:

Domain name and hosting

Choose a domain name that reflects your business name or a relevant keyword. Use a reputable domain registrar to register the domain. Before making a purchase, check with the website platform as many will offer this as part of the package.

Website Platform

Consider using user-friendly website builders like Wix, Squarespace, or WordPress. WordPress is highly customizable and widely used, offering a variety of themes and plugins. Ensure that your chosen platform is mobile-friendly, as many users access websites from mobile devices. If you want a drag and drop template, which is the most user-friendly, Wix or Squarespace may be good solutions for your needs.

Compliance and regulations

Ensure that your website complies with Canadian regulations, especially those related to the financial industry. Include necessary disclaimers, privacy policies, and information required by regulatory bodies.

Your dealer may have additional rules that pertain to having anything published online approved prior, so ensure you know what is allowed and not allowed before hitting the publish button.

Professional design

Opt for a clean and professional design that reflects your brand. Use a consistent color scheme, high-quality images, and clear typography. Include professional photos and a professional logo if available.

Clear navigation

Create a clear and intuitive navigation structure. Include essential pages such as Home, About Us, Services, Contact, and Blog. Make it easy for visitors to find the information they're looking for. Templated solutions will have the core elements built in for you to populate.

Services and value proposition

Clearly articulate your financial services and value proposition. Explain how your services benefit clients and what sets you apart from competitors. Use client testimonials or success stories if available.

Contact information

Provide multiple ways for visitors to contact you, including a dedicated contact page, email address, and phone number. Consider using a contact form for ease of communication.

Security measures

Prioritize website security. Use HTTPS, secure your login credentials, and keep your website software, plugins, and themes updated regularly. This is crucial for safeguarding client information and maintaining trust.

Content creation

Develop informative and engaging content. Create a blog section where you can share valuable insights, financial tips, and industry updates. Regularly update your content to showcase your expertise and improve search engine optimization (SEO).

Search Engine Optimization (SEO)

Implement basic SEO practices to improve your website's visibility in search engines. Use relevant keywords, optimize meta tags, and include local SEO strategies to attract clients in your target location. We are going to cover this subject in more detail in the next section.

Compliance with Accessibility Standards

Ensure your website complies with accessibility standards to make it inclusive for all users, including those with disabilities. This is both good practice and may be a legal requirement in some areas.

Mobile optimization

Test your website on various devices to ensure it is fully responsive and optimized for mobile users. A significant portion of website traffic comes from mobile devices.

Social media integration

Integrate your social media profiles into your website. This helps to build an online community, encourages sharing, and provides additional channels for client engagement.

Regular maintenance

Schedule regular maintenance to check for broken links, update content, and ensure that all features are functioning correctly. This helps maintain a positive user experience.

Legal compliance

Familiarize yourself with and adhere to privacy laws, such as Canada's Personal Information Protection and Electronic Documents Act (PIPEDA). Ensure that your website is compliant with data protection regulations.

By following these steps, you can build for yourself a professional website that not only complies with local regulations but also effectively showcases their services and expertise to potential clients.

You can also outsource this service, and contact a local agency in your area that builds websites.

Search Engine Optimization (SEO)

This is a more advanced section and will only pertain to Advisors who already have a website and want to take things to the next level. If you don't have a website and/or blog, and have no plans to create either, most of these suggestions will not be applicable and you can skip ahead to Social Media Marketing.

SEO (Search Engine Optimization) and Local Optimization are essential for Advisors and Planners to enhance their online visibility and attract local clients. These strategies involve optimizing online content to rank well in search engine results, particularly for local searches.

Keyword Research

Have you ever wondered what consumers are searching for on Google the most? It does not have to be a mystery — anyone can learn how to determine this. You can conduct keyword research to identify the terms and phrases potential clients use when searching for financial services in their local area. This research helps Advisors choose relevant keywords to target in their content.

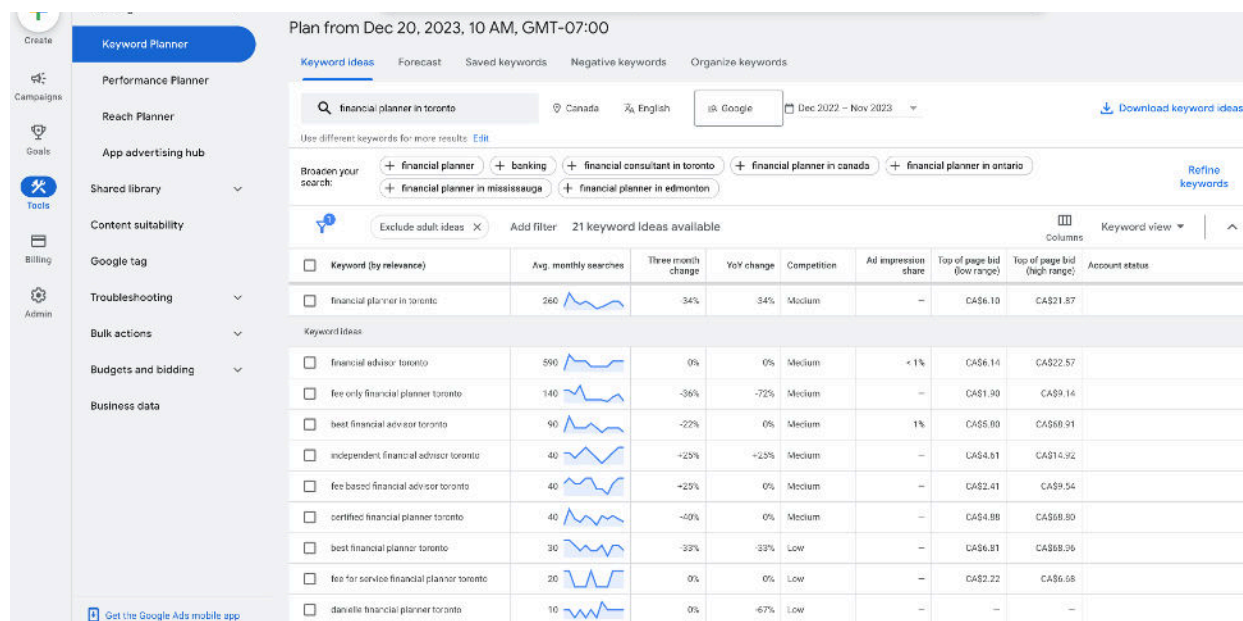
You can learn how to conduct keyword research on Google by following these steps:

1. **Understand the basics of keyword research:** Start by gaining a fundamental understanding of keyword research. Keywords are the words or phrases that people type into search engines like Google when they're looking for information. Keyword research involves finding the keywords that are relevant to your Financial Advisory services and have the potential to attract your target audience.
2. **Identify your target audience:** Before conducting keyword research, it's essential to have a clear picture of your target audience. Consider the demographics, financial needs, and concerns of the clients you want to attract. Understanding your audience helps in finding the right keywords. Think back to your unique value proposition and Buyer Persona exercises.
3. **Use Google's Keyword Planner:** Google offers a free tool called "Google Keyword Planner." You can access it through Google Ads, under Tools, then Planning. This tool allows you to research and analyze keywords. To use it, create a Google Ads account (if you don't have one already) and access the Keyword Planner from your account dashboard.
4. **Start with Discovering new keywords:** Begin by entering a few seed keywords or phrases that are directly related to your financial services. For example, you might start with keywords like "Financial Advisor in Toronto" or "Investment planning in Canada."
5. **Analyze keyword ideas:** The Keyword Planner will generate a list of keyword ideas related to your seed keywords. It will provide data on the average monthly search volume, competition, and suggested bid

for each keyword. Pay attention to the search volume to gauge the keywords' popularity.

6. **Refine your list:** Review the generated keywords and refine your list based on relevance and search volume. You want to target keywords that are both relevant to your services and have a reasonable search volume. Avoid extremely competitive keywords unless you have a robust SEO strategy.
7. **Consider long-tail keywords:** Long-tail keywords are longer, more specific phrases that often have less competition. For example, instead of targeting "financial planning," you might consider "retirement planning for Canadians." Long-tail keywords can be highly effective in attracting a specific audience.
8. **Analyze the competition:** Research the websites that currently rank for the keywords you're interested in. See what kind of content they offer and how competitive the market is for those keywords. This analysis can help you refine your keyword strategy.
9. **Create quality content:** Once you've identified the keywords you want to target, create high-quality content around those keywords. Incorporate them naturally into your website pages, blog posts, and other online content
10. **Monitor and adjust:** Keyword research is an ongoing process. Regularly monitor the performance of your keywords using tools like Google Analytics and adjust your strategy as needed. If you find that certain keywords are not performing well, consider optimizing your content or exploring new keyword opportunities.

For example, you can see in the below screenshot what a quick search for “financial planner in Toronto” yields. You can see the average monthly searches, and we’ve been provided additional ideas.



By following these steps and regularly refining your keyword strategy, Advisors can improve their online visibility, attract more relevant traffic, and ultimately generate leads and clients through Google search. Additionally, you can consider taking online courses or attending webinars specifically focused on SEO and keyword research to further enhance your skills.

On-Page SEO: Optimizing website content, meta descriptions, and title tags for chosen keywords improves the site's search engine ranking. On-page SEO includes using keywords naturally throughout the content and ensuring proper formatting.

Local SEO: Local SEO strategies focus on optimizing content to appear in local search results. Advisors can create Google My Business profiles, ensure accurate business listings on online directories, and encourage client reviews to enhance local SEO.

Content Creation: Producing high-quality, relevant content that addresses local financial topics is essential. Blog posts, articles, and other resources should include locally relevant keywords and information.

Mobile Optimization: As many users search for financial services on mobile devices, ensuring a mobile-friendly website is crucial. Google's algorithms consider mobile-friendliness in rankings.

Link Building: Earning backlinks from local websites and businesses can improve SEO. Advisors can seek opportunities for guest posts and collaborate with local influencers.

Online Reviews: Encouraging satisfied clients to leave positive reviews on Google My Business and other review platforms can enhance local SEO.

Social Media: Maintaining active social media profiles can also contribute to local optimization. Sharing locally focused content and engaging with the community can boost visibility. Advisors and Planners can leverage various social media channels to connect with prospective clients. The choice of the best social media channels may depend on their target audience and the type of content they want to share.

Having a social media presence

When choosing social media channels, it's essential to consider the preferences of your target audience, the type of content you can create, and your marketing goals. It's also crucial to maintain a consistent presence and engage with your audience regularly to build trust and credibility as a Financial Advisor.

The best advice with social media is always going to be to start small. Start with one platform first. Figure that out before incorporating a second into

the mix. It's not about quantity but quality, and you can apply that to essentially all marketing initiatives.

Here are some popular social media platforms for financial professionals:

1. **[LinkedIn](#)**: LinkedIn is often considered the go-to platform for Financial Advisors. It's a professional network where you can connect with professionals and share industry insights, financial tips, and updates about your services. You can also join relevant LinkedIn groups and participate in discussions.
2. **[Facebook](#)**: Facebook is suitable for a broader audience. Financial Advisors can create a Facebook business page and share informative content, financial news, and engage with their followers. You can also run targeted Facebook ads to reach specific demographics.
3. **Twitter**: Twitter is a great platform for sharing real-time financial updates, market news, and quick tips. It's also a place to engage in discussions using relevant financial hashtags.
4. **Instagram**: While primarily visual, Instagram can be used by Financial Advisors to showcase their expertise through visually appealing infographics, financial tips, and behind-the-scenes glimpses of their work. Instagram Stories can also be a valuable tool for engagement.
5. **[YouTube](#)**: Creating educational videos and webinars is a powerful way to connect with prospective clients. Financial Advisors can use YouTube to explain complex financial concepts, provide market updates, and offer investment advice. YouTube videos are also an

easy way to beef up your blog, when we get there.

6. **Pinterest:** Pinterest can be effective for advisors who want to create and share financial infographics, tips, and other visually appealing content. It's especially useful for engaging with female clients, as it has a predominantly female user base.
7. **Quora:** While not a traditional social media platform, Quora allows Advisors to answer financial questions and establish themselves as experts in the field. By consistently providing valuable answers, advisors can attract potential clients seeking financial advice.
8. **Blogging Platforms:** While not a social media platform, maintaining a blog on platforms like WordPress or Medium can help advisors share in-depth articles and insights. Sharing blog posts on social media can expand their reach.
9. **Professional Networks:** Aside from LinkedIn, platforms such as Alignable can be beneficial for financial advisors looking to connect with a professional audience or local businesses.

If you're just starting, I'd suggest beginning with LinkedIn. As mentioned earlier in the Website section, LinkedIn can act as a great substitution if you don't have a website or blog up and running just yet.

Once you establish a social channel or two and begin publishing regularly, you may want to use some form of scheduling tool. This helps ensure you maintain consistency, but it's not something you need to worry about when you're first beginning to publish.

Social Media Management Tools: Use social media management platforms to schedule posts, track engagement, and analyze performance

across various social media channels. These tools save time and allow for consistent social media presence.

Here are some of the most popular options:

1. **Hootsuite:** Hootsuite is a widely used social media management platform that allows users to schedule posts, monitor social media conversations, and measure performance across social networks
2. **Buffer:** Buffer is a user-friendly tool that lets small business owners schedule and publish posts, engage with their audience, and analyze social media performance. It supports multiple platforms, including Facebook, Twitter, LinkedIn, Instagram, and Pinterest
3. **Sprout Social:** Sprout Social is a comprehensive social media management and analytics platform that provides small businesses with tools for scheduling, publishing, engagement, and reporting on social media performance
4. **Later:** Later is primarily known for Instagram scheduling and management, but it also supports Facebook, Twitter, and Pinterest. It's a great choice for small businesses focused on visual content
5. **SocialBee:** SocialBee offers content categories and posting schedules that help small businesses maintain a consistent social media presence. It supports various social networks
6. **Agorapulse:** Agorapulse is a social media management tool with features for scheduling, engagement, and reporting. It covers major platforms like Facebook, Twitter, Instagram, LinkedIn, and YouTube

When you feel like you're ready to take this step, you can choose a social media management tool based on your specific needs, budget, and the social platforms. These tools can save time and resources while helping businesses maintain an active and engaging social media presence. We use Buffer, in case you were wondering!

Getting started with paid ads

Digital advertising through platforms like Google Ads and Facebook Ads can be powerful tools to expand your reach, connect with potential clients, and build a robust online presence. In this guide, we'll explore how Financial Advisors can leverage these platforms to enhance their marketing efforts and attract the right audience.

This is also a more advanced strategy, and not something you want to jump into prior to having your foundational elements in place.

It's important to understand that when it comes to paid ads, they rarely “work” when utilized as a single initiative for personalized services that require a high level of trust. After all, you are not selling pizza here. Meaning, paid ads typically work better as part of a larger program.

Converting “cold traffic” — people who have no idea who you are — is difficult. Converting warm traffic, people who are familiar with you, is easier. If you are willing to pay to get people into your network and on to your radar, you can then continue to nurture that lead and eventually make the conversion.

When we get to Content Marketing in Chapter 4, it will become clear how paid ads can be used to grow your email list and drive traffic to your blog.

It's important to start with a goal in mind. Do you want to drive traffic to your blog? Do you want to grow your email list? Do you want people to book an appointment? Start with one goal in mind and optimize to convert for that.

If you bring users to a page with multiple options, it's likely they will take no action. Have one clear Call To Action.

Getting Started with Ads

Google Ads:

Google Search Ads is a good channel to reach individuals who are actively searching for your solution.

- **Setting Up Your Google Ads Account:** Begin by creating a Google Ads account, specifying your target location, budget, and campaign objectives. Configure conversion tracking to measure the success of your campaigns accurately.
- **Keyword Research and Targeting:** Identify relevant keywords related to financial advisory services. Utilize tools like Google Keyword Planner to find high-performing keywords, ensuring your ads reach users actively searching for financial guidance. This process was covered extensively in Chapter 3 under the Search Engine Optimization section.
- **Crafting Compelling Ad Copy:** Create concise and compelling ad copy that highlights the unique value propositions of your Financial Advisory services. Emphasize trust, expertise, and the benefits clients will gain from choosing your services. Think back to your unique value proposition and Buyer Persona.

- **Budgeting and Bidding Strategies:** Carefully set your budget and bidding strategy based on your business goals. Experiment with bidding strategies like cost-per-click (CPC) or cost-per-acquisition (CPA) to optimize your ad spend.

Meta Ads (Facebook Ads and Instagram Ads):

Meta Ads (Facebook and Instagram ads) are an effective way to reach customers who might not be actively looking for your solution but are ideal clients for your business.

- **Creating a Business Page:** Establish a professional and engaging Facebook Business Page and Instagram account. Complete all relevant details, including a compelling bio, contact information, and a high-quality profile and cover photo.
- **Defining Your Target Audience:** Leverage Facebook's detailed targeting options to define your audience based on demographics, interests, and behaviors. Refine your targeting to reach users who are likely to be interested in Financial Advisory services
- **Ad Formats and Creatives:** Experiment with different ad formats such as carousel ads, image ads, and video ads. Use visually appealing creatives that convey trust, reliability, and the benefits of your services. Create engaging content including educational content, case studies, and thought leadership articles or blog posts that can be utilized in your social ads.
- **Tracking Conversions and Engagement:** Implement the Facebook Pixel on your website to track user interactions and measure conversions. Analyze engagement metrics, such as likes, comments, and shares, to gauge the overall impact of your ads.

Analyzing and Optimizing Your Ad Campaigns

Key Performance Indicators (KPIs) for Ads

- Click-Through Rates (CTR): Evaluate the CTR to gauge the effectiveness of your ad copy and creative elements. A higher CTR often indicates more engaging and relevant content.
- Cost Per Click (CPC): Track the cost per click to optimize your budget and bidding strategies. A lower CPC indicates efficient use of your advertising budget.
- Conversion Rates: Monitor conversion rates to understand how effectively your ads are turning clicks into valuable actions, such as lead submissions or client acquisitions.
- Return on Investment (ROI): Calculate the ROI of your advertising campaigns over time by comparing the revenue generated against the costs incurred. This metric provides a clear picture of your campaign's profitability.

A/B Testing and Continuous Improvement

- Testing Ad Copy and Creative Elements: Conduct A/B tests on different ad variations to identify which elements resonate best with your audience. Test headlines, imagery, and calls-to-action to refine your messaging.
- Adjusting Targeting Parameters: Experiment with different audience segments on each platform to identify the most responsive groups. Refine your targeting parameters based on the performance of various demographics and interests.

- **Scaling Successful Campaigns:** Identify the campaigns that yield the best results and consider scaling them by increasing the budget or expanding the target audience. Ensure scalability without compromising on performance.

Financial Advisors can grow their assets under management and receive more referrals with Snap. [Start your 14-day Free Trial now.](#)

Chapter 4: Content Marketing

Content Marketing involves creating and sharing valuable, relevant, and consistent content to attract and engage your target audience. It's an effective way to build trust, demonstrate expertise, and generate leads.

Today's consumers are online absorbing content practically 24/7. Creating content allows you to be present where your audience is already spending their time. If you're not there, someone else will be there to attract their attention. It's not necessarily about competing for attention, but making your content — and yourself — present in a valuable way.

In this chapter we will provide the most basic steps to get started. Then, we will cover different types of content you can create followed by more advanced tips and strategies to scale your efforts through email marketing, lead magnets, and blogging.

Basic steps to start creating and sending out content:

Here is how other Advisors have started creating content, and it's going to be simpler than you think. This is the 5-step process.

1. Start with your existing clients and email marketing. Assuming you have their permission to email them, you can use a free email marketing tool like MailChimp or our fav, ConvertKit. It's totally fine if your list only has 10 names. You've got to start somewhere!
2. Pick a cadence that feels manageable — bi-weekly is a great place to start and you can build from there. Block time in your calendar, a few hours at least, to protect that time and ensure you can meet the creation goal you have set for yourself.
3. Now comes the perceived hard part, which is — what am I going to create and send out? Good news again, because this can actually be quite simple. What you're going to do is sit down and look through all your client meeting notes. What did you discuss? What questions did you receive? The goal is to create content that your clients want and you should be able to determine what they want to know more about from your meetings. Start making a list of the things your clients talk about and the questions they ask you. If 3/6 clients last week were asking about tax planning, there's your topic. Start looking for patterns.
4. Craft an email on your topic of choice and include video when possible. It's a lot quicker to talk into your webcam if writing does not come easily to you. You could also upload the video to [YouTube](#) and use their transcribing feature. It does not need to be perfect. You just need to start with something relevant and valuable. You can work on improving your delivery as you go. Always create your email outside of the service you are using to ensure you have the content in your possession. Just copy and paste into the email program once you're ready.

5. Send it out consistently! Grow your list weekly by inviting all new clients and all prospects you meet with to join your mailing list. Make sure you articulate that your newsletter is driven by addressing your most common client questions and concerns. If you have a website, you can add a form that connects to your email service and asks people to opt-in, [just like this](#).

Those are the absolute most basic steps to getting started. Once you achieve that, once you have a consistent process for creating and distributing quality content via email, all the steps to scaling will be easier.

Many people make a lot of mistakes when it comes to creating content. They do it for the wrong reasons. They expect an immediate and obvious return on investment. They think that quantity is more important than quality. Content takes time, but as long as you start with the primary objective of providing value to your clients, you can't go wrong.

Email Marketing

Once you have achieved the initial stages, the 5-step process provided above, you will be ready to scale your efforts by building and growing your email list.

Starting Your Email List

Choose an email marketing platform:

Email marketing platforms provide tools for creating and sending email campaigns. They also offer analytics to measure the success of your email marketing efforts. Personalize emails to target specific client segments with relevant content.

Select a reputable email marketing platform that complies with Canadian data protection laws (e.g., Canada's Anti-Spam Legislation - CASL).

Here are five email marketing platforms widely used for small businesses in Canada:

1. **Mailchimp:** Mailchimp is a popular and user-friendly email marketing platform known for its drag-and-drop email builder and a wide range of templates. It offers marketing automation, A/B testing, and robust analytics. Mailchimp provides a free plan with limited features and paid plans to suit various needs.
2. **Constant Contact:** Constant Contact is a user-friendly email marketing platform designed for small businesses. It offers customizable templates, list management, automation, and integration with e-commerce platforms. They also provide in-depth reporting and analytics.
3. **GetResponse:** GetResponse is a versatile email marketing platform with a user-friendly interface. It offers email marketing, marketing automation, landing pages, webinars, and e-commerce tools. GetResponse is suitable for businesses looking to create comprehensive marketing campaigns.
4. **ConvertKit:** ConvertKit is designed for content creators, bloggers, and small businesses looking to build and nurture their email lists. It provides automation tools, customizable forms, and subscriber segmentation. ConvertKit is known for its simplicity and focus on user engagement.
5. **AWeber:** AWeber is an email marketing platform with a history and a reputation for reliability. It offers email automation, customizable sign-up forms, and a variety of integrations. AWeber is suitable for businesses of all sizes, with a strong focus on small businesses.

These platforms offer a mix of features, pricing plans, and user-friendliness. Advisors should select an email marketing platform that aligns with their specific needs, budget, and goals. Many of these platforms offer free trials or free plans with limited features, allowing business owners to try them out before committing to a paid subscription.

Growing Your Email List

Once you've selected an email marketing platform, it's time to focus on growing that list. You will want to segment, at minimum, for clients and prospects. This section assumes you have mastered the previous 5-step process and are already sending out regular content to your existing clients.

Here is how you can grow your email list with prospective clients:

Create a Lead Magnet:

Develop a valuable and relevant lead magnet to entice visitors to subscribe. This could be a free ebook, financial planning guide, or access to exclusive content. Make sure it addresses the needs and interests of your target audience. This will be covered in-depth in the following section.

Opt-in form on your website:

Place an opt-in form prominently on your website. The form should be easy to find, and the language should clearly communicate the benefits of subscribing. Consider using pop-ups, slide-ins, or static forms on key pages. The opt-in form comes directly from your email marketing platform. This process is covered in the following Lead Magnet section as well.

Leverage landing pages:

Create dedicated landing pages for specific lead magnets or promotions. These pages should focus on convincing visitors to subscribe and provide their contact information.

Offer exclusive content:

Promise exclusive content or early access to important financial insights to subscribers. Make it clear why joining your email list will benefit them.

Promote on Social Media:

Use your social media channels to promote your lead magnet and encourage followers to subscribe to your email list. Run targeted ads to reach a wider audience. (See Chapter 3, Getting started with paid ads)

Collaborate with partners:

Partner with other businesses or professionals in the financial industry to cross-promote each other's content and services. This can expand your reach and attract new subscribers.

Host webinars or workshops:

Host online webinars or in-person workshops on relevant financial topics. Require registration, and collect email addresses from participants. Ask registrants to bring family members.

Networking events:

Attend local business and networking events. Collect business cards or use a tablet or smartphone to allow people to sign up for your newsletter directly. The Blinq app is a great digital business card, and you can also use Canva to create a QR code that connects to any website. Follow up after the event with a confirmation note and additional valuable content.

Offer free consultations:

Promote free initial consultations and require visitors to provide their email addresses when scheduling. This not only grows your list but also identifies potential clients.

Run Contests or giveaways:

Organize contests or giveaways with the condition that participants subscribe to your email list. Ensure that the prize is attractive to your target audience. This suggestion comes with a warning as it can be tricky to come up with ideas that will *only* attract your target audience. There is no value in casting too wide a net and getting people onto your list that are not ideal clients.

Optimize your website for conversions:

Continuously optimize your website for conversions. Test different call-to-action buttons, wording, and placement to maximize the number of visitors who subscribe.

Encourage referrals:

Implement a referral program where existing subscribers can refer others to join your email list. Offer incentives such as exclusive content.

Segment your list:

As your list grows, segment it based on demographics, interests, or engagement levels. This allows you to send targeted and personalized content, increasing the chances of conversion. For example, think about Life Events. You can create valuable content around various life events to engage with clients and provide relevant guidance.

Regularly provide value:

Consistently deliver valuable content to your subscribers. This not only helps retain existing subscribers but can also encourage them to share your content, expanding your reach.

Remember to comply with all relevant regulations, including CASL, and respect the privacy and preferences of your subscribers. Building an email

list is an ongoing process, so continuously evaluate and refine your strategies based on the performance of your campaigns.

Content ideas for newsletters, blogs, and lead magnets

In addition to the questions and concerns your clients are coming to you with, Life Events are a great way to come up with topic ideas and segment your email list as it grows.

Here are some key life events that Advisors can focus on when developing content:

Marriage: Financial considerations for newlyweds, combining finances, setting joint financial goals, and discussing strategies for handling money as a couple.

Homeownership: Tips on budgeting for a new home, understanding mortgage options, and planning for ongoing homeownership costs. Additionally, content on home equity, refinancing, and leveraging home equity for other financial goals.

Birth of a child: Financial planning for new parents, including budgeting for childcare expenses, saving for education, and adjusting insurance coverage.

Career changes: Guidance on navigating job changes, negotiating salary, and understanding the financial implications of career transitions. This can include content on retirement accounts, employer benefits, and tax considerations.

Retirement planning: Retirement savings strategies, understanding pension plans, and creating a retirement income plan. Content can

also cover lifestyle considerations, healthcare costs in retirement, and how to make the most of retirement accounts.

Education planning: Saving for education expenses, understanding different education savings accounts, and evaluating college funding options. Addressing the impact of education costs on long-term financial plans.

Inheritance: Guidance on managing inherited wealth, tax implications, and strategies for preserving and growing the inherited assets. Content can cover estate planning considerations and the importance of beneficiary designations.

Divorce: Financial implications of divorce, including asset division, spousal support, and updating financial plans post-divorce. Information on rebuilding finances and setting new financial goals.

Health issues: Managing finances in the face of health challenges, understanding health insurance options, and planning for potential healthcare costs. Content on long-term care insurance and health savings accounts can be valuable.

Unexpected windfalls: Guidance on managing sudden wealth, such as an inheritance or a financial windfall. This can include topics like tax considerations, investment strategies, and wealth preservation.

Starting a business: Financial considerations for entrepreneurs, including business planning, budgeting, and understanding the financial impact of business decisions. Content on retirement planning for business owners and succession planning.

Economic downturns: Providing guidance during economic downturns, market volatility, and recessions. Addressing concerns, explaining investment strategies during tough times, and offering reassurance.

Aging parents: Financial considerations when caring for aging parents, including healthcare costs, long-term care planning, and estate planning. Content can also cover the impact on the caregiver's financial well-being.

Charitable giving: Strategies for incorporating charitable giving into financial plans, maximizing the impact of donations, and understanding the tax implications of charitable contributions.

Personal development and hobbies: Encouraging clients to pursue personal interests and hobbies. Financial planning content can cover budgeting for hobbies, making smart spending decisions, and balancing personal fulfillment with financial goals.

Creating content around these life events demonstrates your expertise and commitment to helping clients navigate critical moments in their lives. It also provides an opportunity to stay connected with clients and offer ongoing value.

Creating a nurture sequence and sending out newsletters

In your basic 5-step process to start creating and sending out content via emails to your existing clients, we covered sending out a newsletter-style email on a regular schedule. Now, we can build on this idea once that has been established.

Sending out timely and relevant emails will be an important component of your marketing, but we can also create what we call Evergreen nurture sequences that are designed for non-clients only. As you're building your email list, you will want prospects who opt-in to enter a separate marketing funnel. Lead magnets are a great way to get opt-ins and they are covered in detail later in this chapter.

After a prospective client opts into your list, or has a free consultant, for example, they should enter a nurture sequence that has been designed for prospective clients. They can also receive your regular newsletter that goes out to clients.

Creating a successful email nurture series for prospective clients involves delivering valuable content, building trust, and guiding them through the decision-making process. Below is a template for a general email nurture series that can be tweaked for personal use. Keep in mind that the timing and frequency of emails can be adjusted based on your preferences and the preferences of your target audience.

This is something that needs to be tailored to your audience, but here is a very generalized template to help give you some direction and get you started.

Email Nurture Series Template: Financial Planning Essentials

Email 1: Introduction and Welcome

- Subject: Welcome to [Financial Advisor's Name]'s Financial Planning Community!

- Briefly introduce yourself, highlighting your expertise and commitment to helping clients achieve financial goals.
- Set expectations for the nurture series and emphasize the value subscribers will receive.
- Include a call-to-action (CTA) encouraging subscribers to reply with any specific financial topics or questions they'd like to learn more about.

Email 2: Understanding Your Financial Goals

- Subject: Let's Define Your Financial Goals Together
- Discuss the importance of setting clear financial goals.
- Provide a link to a survey or questionnaire to help prospects identify and prioritize their financial objectives.
- Emphasize your commitment to crafting personalized strategies based on their unique goals and aspirations.

Email 3: The Power of Financial Planning

- Subject: Unlock Your Financial Potential with Strategic Planning
- Explain the benefits of comprehensive financial planning.
- Share a success story or case study illustrating how strategic planning positively impacted a client's financial life.
- Invite subscribers to schedule a complimentary consultation to discuss their specific financial needs.

Email 4: Dive into Investment Strategies

- Subject: Navigating the World of Investments: A Closer Look
- Introduce the basics of investment strategies and the role they play in financial planning.
- Provide a link to a webinar or downloadable guide on investment basics.
- Encourage subscribers to explore the various investment options tailored to their risk tolerance and financial goals.

Email 5: The Importance of Risk Management

- Subject: Mitigating Risks: Protecting Your Financial Future
- Discuss the significance of risk management in financial planning.
- Offer insights on insurance options, emergency funds, and protecting assets.
- Highlight how your expertise can help subscribers create a robust risk management plan.

Email 6: Tax Efficiency Strategies

- Subject: Maximizing Your Wealth: Tax Efficiency Strategies
- Explore tax-efficient investment strategies and planning.
- Share tips on minimizing tax liabilities and maximizing returns.
- Invite subscribers to a webinar or workshop on tax planning.

Email 7: Planning for Retirement

- Subject: Secure Your Retirement: Planning Tips and Insights
- Discuss key considerations for retirement planning.
- Provide resources on calculating retirement needs and maximizing savings.
- Include a CTA for scheduling a consultation to create a personalized retirement plan.

Email 8: Your Financial Journey Continues

- Subject: Continuing the Conversation: Your Financial Journey
- Summarize the topics covered in the nurture series.
- Reinforce your commitment to guiding subscribers on their financial journey.
- Encourage subscribers to reach out for personalized advice and to discuss their financial plans further.

Remember to personalize each email and tailor the content to the interests and needs of your prospective clients. Regularly analyze engagement metrics to refine and optimize the nurture series over time.

If subscribers are opting out at a rate higher than 1% for any given email, you will want to revisit that and see how you can make it more valuable. Pay attention to what emails get responses and engagement, as that's a clear indicator what your subscribers are interested in.

This template also assumes you are setting yourself up with the option for online booking via something like Calendly, which is highly recommended and comes up in various sections throughout this Guide.

Ensure that as prospects become clients, they are removed from this sequence and will only receive client content.

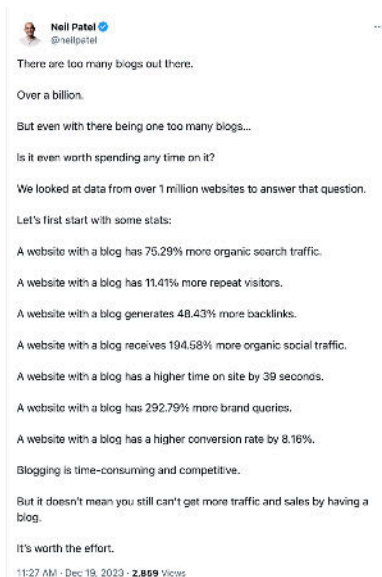
Blogging

If you've selected a user-friendly website builder like Wix, Squarespace, or WordPress, you will be able to easily add a blog to your website. Your individual program will have specific instructions on how to enable the blog once your website has been established. It's typically simple, just do a search within the help section and you should find a step-by-step guide. As soon as it's enabled, you're ready to publish your first piece.

You may be wondering if this is necessary, and the answer is a resounding yes. Once you've established your email marketing strategy, you can begin working toward publishing content regularly on your blog. The same content ideas that work for your emails will work for your blog, so there is no need to duplicate your work.

Your blog content will serve multiple purposes — this can be what you send via email, and also what you share on social media. It will help drive organic traffic to your website and create the foundation for your online presence. It will help grow your email list, and give you re-marketing opportunities once you've built up some traffic.

I recently came across a Twitter post by Neil Patel, who is an absolute legend in the digital marketing space. After reviewing data from over 1 million websites, he's been able to validate the importance of having a blog. It's not about competing with all the other blogs out there — it's about getting relevant traffic to your own site.



Once your blog is live, there will be best practices to follow that will help you to showcase your expertise, build credibility, and connect with your target audience.

Here are some blogging best practices to consider as you move forward with regularly publishing.

Understand compliance and regulations

Familiarize yourself with industry regulations, including those set by regulatory bodies such as the Financial Advisors Association of Canada (Advocis). Ensure that your blog content complies with these regulations, especially regarding the communication of financial advice.

Identify your target audience

Clearly define your target audience. Understand their needs, concerns, and interests. Tailor your blog content to address the specific financial questions and challenges they may face.

Create a content calendar

Plan your content in advance by creating a content calendar. This helps you stay consistent with your publishing schedule and ensures that your blog covers a diverse range of topics relevant to your audience. Excel or Google Sheets will work great for this.

Creating a content and/or marketing calendar will help you manage your topic ideas and stay organized. You can include dates, milestones, and deadlines in your calendar to keep yourself on track. You can also use this calendar to delegate tasks to your team members, ensuring that the plan is executed.

Focus on educational content

Provide valuable and educational content. Your blog should offer insights, tips, and guidance on financial planning, investment strategies, and other relevant topics. Aim to answer common questions and address concerns your audience may have.

Be transparent and authentic

Build trust by being transparent and authentic. Share your expertise in a way that is easy to understand, and avoid using jargon that may confuse your audience. Share personal experiences or case studies to make your content relatable.

Use a professional tone

Maintain a professional tone in your blog posts. While you want to be approachable, it's important to convey authority and expertise. Proofread your content to ensure it is free from grammatical errors.

Incorporate local relevance

Include content that is relevant to the Canadian financial landscape. Discuss topics such as tax planning specific to Canada, updates on financial regulations, and insights into the Canadian market.

Optimize for SEO

Implement basic search engine optimization (SEO) practices to improve the visibility of your blog. Use relevant keywords, include meta tags, and create content that addresses common search queries related to financial planning. This was covered in Chapter 3.

Encourage engagement

Foster engagement with your audience. Encourage readers to leave comments, ask questions, and share your content. Respond promptly to comments and engage in discussions to build a sense of community.

Promote your blog

Actively promote your blog through various channels. Share your posts on social media, include links in your email newsletters, and consider networking with other professionals who may share your content with their audience.

Utilize visuals

Incorporate visuals such as charts, graphs, and infographics to enhance the visual appeal of your blog. Visuals can help explain complex financial concepts and make your content more engaging.

For making visuals, Canva is a great tool, and you can also find free, quality images on sites like Pexels and Pixabay.

Include a Call-to-Action (CTA)

Each blog post should include a clear call-to-action. This could be inviting readers to subscribe to your newsletter, schedule a consultation, or explore other relevant resources on your website. Again, it's important to consider with every piece of content you create, and every marketing campaign — what is the action you want the prospective client to take? Optimize for this. We will cover the opt-in process for lead magnets shortly. If you want readers to schedule a consultation, check out a program like Calendly to automate the booking process. If booking consultations is your goal, you can include your Calendly link in emails, blogs, and social media posts. A booking tool like Calendly will integrate with your calendar and then similar to your email marketing platform, it will provide you with a link or unique page readers can access and book time with you. If you wish to hold your meeting virtually (online), you can also integrate with online video conferencing tools like Zoom or Teams to further automate this process.

Monitor analytics

Use website analytics tools to monitor the performance of your blog. Track metrics such as page views, engagement, and conversion rates. Analyzing data helps you understand what content resonates most with your audience.

Stay informed

Stay informed about industry trends, market changes, and new developments in financial planning. This allows you to provide timely and relevant content to your audience.

Comply with data privacy laws

Ensure that your blog complies with data privacy laws, including Canada's Personal Information Protection and Electronic Documents Act (PIPEDA). Clearly communicate your privacy policy and handle personal information responsibly.

By following these best practices, Canadian Financial Advisors can establish a successful blog that not only showcases their expertise but also adds value to their clients and prospects.

Lead Magnets

Lead magnets have been mentioned repeatedly throughout this guide already, and that is because of their widespread value. Lead magnets will demonstrate your expertise, provide value to your clients, and start building trust with prospective clients. Good lead magnets will often serve as the primary driver to growing your email list and can also be used for paid ads when the goal is to get contact information.

A lead magnet is really any piece of content that gets a prospective client to share their name and email address with you in exchange for something they deem valuable. Contact information is currency.

In order to create the system for lead magnets, you're going to need a few things — but if you've been following along and doing things in order, you are well-positioned to action this item.

Your blog and your email marketing platform will work together to execute this task. You can create unique landing pages for your opt-ins, if you want to get fancy, but that is not necessary when you're first getting started. Start with keeping it as simple as possible and then iterate and improve as you go.

Here is an example of a [dedicated landing page opt-in](#) for your reference. This website is hosted on WordPress, as is the blog. We use ConvertKit for our email marketing campaigns, so the form you see on the page there is created in ConvertKit and then embedded onto the webpage. How to create the lead magnet opt-in process in your blog:

1. Start with creating your opt-in resource. If you're providing a PDF, you can use a program like Canva to create the document and then

attach it in your email program. You can also have a graphic designer create the PDF for you (once you've created the content) which is a worthwhile investment if you are investing the time to create a valuable piece of content that will remain relevant for a long period of time (we call this Evergreen content.)

2. Create a blog post that is about the same topic as your opt-in. It's important that when people click into a blog post, the opt-in topic is the same. If it's not, it won't make any sense to the end user. For example, if you're providing a Budgeting checklist, your blog post could be about why Budgeting is important. The checklist becomes the natural next step for the reader to take action on the topic they are clearly interested in.
3. Use your email marketing program to create the opt-in form. In ConvertKit, which is what we use, they call these "Landing pages & Forms". You have the option to create an opt-in form that you can embed on your site and blog, or you can create an entire stand-alone page. Within the form settings you can either direct someone to a URL or attach a download. Once they provide their name and email, they will be able to access their resource.
4. That's it! It's not overly complicated. Once you struggle through the process a few times, the dots will connect and you'll be able to do this easily moving forward.
5. Ideally, you will create a nurture sequence in your email marketing campaign. After potential clients download your resource, they should continue to receive high-value drip content from you.

Here are five effective types of lead magnets for Financial Advisors:

Financial Planning Guides and eBooks:

Offer comprehensive guides or eBooks that provide valuable insights into various aspects of financial planning. Topics could include retirement planning, investment strategies, tax planning, or any other area that aligns with your target audience's interests. Ensure that the content is informative, easy to understand, and addresses common questions. You also have the Life Events list with 15 ideas provided previously in this chapter which is a great place to start, depending on your target audience.

Budgeting Templates and Tools:

Provide practical tools that assist individuals in managing their finances. This could include budgeting templates, expense trackers, or financial planning calculators. These tools can help prospects take tangible steps toward better financial management while showcasing your expertise.

Exclusive Webinars or Workshops:

Host exclusive online webinars or workshops on relevant financial topics. Promote these events as valuable learning opportunities, and require attendees to provide their contact information to register. You can also ask clients and registrants to bring their friends and family. This approach not only captures leads but also positions you as an authoritative source of financial knowledge.

We use a platform called GoToWebinar for our webinars, but there are plenty of other options out there. It's not perfect but it's easy to use and provides the simple opt-in process to host the webinar and collect contact information. It also allows you to ask questions, run surveys, and provide handouts to your audience.

When prospective clients register for your webinars, the registration process will collect their information, so the lead magnet opt-in process is essentially happening in the same manner, without having to go through the full process as outlined above. Just remember that you will need to export your registrant list and add them to your nurture sequence manually, unless you're using something like Zapier to create an automatic integration.

Retirement Planning Checklists:

Create downloadable checklists or guides specifically focused on retirement planning. Offer step-by-step guidance on key considerations, such as estimating retirement expenses, maximizing savings, and understanding pension options. A well-organized checklist can be a valuable resource for individuals approaching retirement.

Investment White Papers or Research Reports:

Develop in-depth white papers or research reports that dive into specific investment strategies, market trends, or economic analyses. Prospective clients interested in wealth management and investment advice may be attracted to these informative and data-driven resources. Ensure that the content is presented in a clear and accessible format.

When creating lead magnets, it's essential to understand your target audience and tailor the content to their needs and preferences. Additionally, promote your lead magnets through various channels, including your website, social media, and email marketing, to maximize their reach and effectiveness.

Once you have created something, ask for feedback. Better yet, find out what your clients and prospects want, and create it for them. This can be done as easily as sending out an email or a quick survey to your current clients.

Advancing your Content Marketing efforts

Content can come in various forms, including blogs, articles, videos, infographics, podcasts, webinars, whitepapers, and social media posts. The key is to choose the formats that resonate with your target audience. This is often achieved through trial and error. When you're just starting out, do what comes naturally to you. If you hate writing but are comfortable on camera, it will be much easier for you to start with videos than blogging. Throughout this chapter, we have provided you with specific steps to start creating and publishing content via email. We've gone through email marketing, content ideas, blogging, and creating lead magnets. Once you have the basics covered, you may be ready for some more advanced tactics.

Timing of content type

A typical sales funnel represents the stages that a potential customer goes through before making a purchase. The funnel concept illustrates the journey from initial awareness of a product or service to the final conversion.

While specific sales funnels can vary depending on the industry and business model, a standard sales funnel often includes the following stages:

Awareness:

At the top of the funnel, the goal is to create awareness about your services. This is the stage where potential customers become aware of your brand through marketing efforts such as advertising, content marketing, social media, or word of mouth.

Interest:

Once people are aware of your brand, the next stage is to generate interest. In this stage, potential customers may start to explore your website, read content, and engage with your brand on social media. The goal is to capture their interest and keep them engaged.

Consideration:

As potential customers show continued interest, they move into the consideration stage. Here, they are actively researching and comparing options. They might sign up for newsletters, download resources, or attend webinars. The focus is on providing valuable information and building trust.

Intent:

At this stage, potential customers have demonstrated a clear intent to potentially engage your services. They may book a free consultation, ask questions, or interact with more targeted content. The goal is to understand their specific needs and address any concerns they may have.

Purchase:

The purchase stage is where the conversion happens. The customer decides to become a client and formally engage with your Firm. The focus now shifts to providing a smooth and positive client experience.

Post-Purchase, the Retention and Advocacy Stage:

The relationship with the customer doesn't end after the engagement, especially in the Financial Advisory world. It's really just the beginning and it's one of the easiest places to focus on building loyalty and encouraging repeat business. Post-purchase activities include providing excellent customer service, seeking feedback, and encouraging clients to become advocates through referrals and testimonials. We will cover Referrals in Chapter 5.

Here's a breakdown of the key content components at each funnel stage:

Top of the funnel (TOFU):

- Activities: Awareness campaigns (using paid ads to drive traffic to your blog, for example), social media, content marketing, advertising.
- Content: Blog posts, social media content, infographics, videos.

Middle of the funnel (MOFU):

- Activities: Email campaigns, webinars, lead magnets (e.g., eBooks, Whitepapers).
- Content: Case studies, in-depth guides, webinars, email newsletters.

Bottom of the funnel (BOFU):

- Activities: Free consultations and personalized offers.
- Content: Sample financial plans, interactive tools and calculators, testimonials, comparison guides.

Post-purchase:

- Activities: Customer support, follow-up emails, loyalty programs, referral programs.
- Content: Customer success stories, surveys, educational content.

It's important to note that the sales funnel is not always a linear process, and customers may enter at different stages. Additionally, the funnel is a dynamic model that businesses often revisit and optimize based on data and customer feedback.

Ideally, you want to create content for different stages of the funnel. But try not to get bogged down with the details when you're just starting out. The important thing is to start, so you have a benchmark to improve. You can tweak and adjust as you go.

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Chapter 5: Analytics and Measurement

This is a more advanced topic, and again, something to add in once you're off the ground with the basics.

Determining and tracking Key Performance Indicators (KPIs) will help you regularly assess the effectiveness of your marketing efforts. If you want to improve, it will be essential to identify the key metrics that matter most to your business and track them consistently.

You'll want to learn how to use analytics tools to gain insights into your website and social media performance, as well as gain the ability to make data-driven decisions for continuous improvement.

Measurement and Analytics

Set clear goals: Before using analytics tools, define clear and specific goals for your marketing efforts. Whether it's increasing website traffic, generating leads, or improving conversion rates, having defined objectives will help you measure success.

Website analytics: Utilize website analytics tools like Google Analytics to monitor your website's performance. Track metrics such as traffic, bounce rates, time on page, and conversion rates. Identify which pages are most popular and which ones need improvement.

Email marketing analytics: Most email marketing platforms provide detailed analytics on email campaign performance. Track metrics like open rates, click-through rates, conversion rates, and unsubscribe rates. Use this data to refine your email content and strategy.

Social media analytics: Each major social media platform offers its analytics tools (e.g., Facebook Insights, Twitter Analytics, LinkedIn Analytics). Monitor engagement metrics, audience demographics, and the effectiveness of your social media posts.

Marketing automation tools: If you use marketing automation, leverage the analytics provided by these tools. They can help you understand how leads are moving through the sales funnel and which marketing channels are most effective.

A/B testing: Conduct A/B testing on various elements of your marketing campaigns, such as email subject lines, ad copy, and landing page designs. Analytics will show you which version is more effective, allowing you to make data-driven improvements.

Conversion tracking: Implement conversion tracking to monitor specific actions taken by website visitors, such as filling out a contact form or downloading a resource. Conversion tracking helps you gauge the effectiveness of your calls to action.

Keyword analysis: For online advertising, use tools like Google Ads to analyze the performance of your keywords. Identify which keywords lead to the highest click-through rates and conversions.

Segmentation and personalization: Use analytics to segment your audience based on demographics, behavior, or engagement. This allows for personalized marketing efforts, improving the relevance and effectiveness of your messages.

Customer Relationship Management (CRM): Integrate your CRM system with your marketing efforts. Analyze customer data to understand their behavior and preferences, helping you tailor your marketing strategies.

Attribution models: Use attribution models to understand how different marketing touchpoints contribute to conversions. This enables you to allocate your marketing budget more effectively.

Regular reporting: Create regular reports that summarize key metrics and performance indicators. These reports help you assess the overall effectiveness of your marketing efforts and make data-driven decisions.

Continuous improvement: Continually analyze data and make adjustments to your marketing strategies. Experiment with different approaches and tactics based on the insights you gain from analytics.

Training and education: Invest in training and education to ensure you and your team have the skills to interpret and act on the data provided by analytics tools.

By using analytics tools effectively, you can gain valuable insights into the performance of your marketing efforts. This data-driven approach allows for continuous improvement, optimization of marketing strategies, and better results in reaching and engaging clients. As mentioned previously — likely multiple times at this stage — the key is to start, keep it simple, and give yourself something to track and improve as time goes on.

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Chapter 6: Marketing Budget and Resources

Allocating resources, which includes understanding how to allocate your time, money, and energy effectively, are all important if you are going to achieve your marketing goals. Eventually, you'll need to create a budget that aligns with your marketing strategies and ensures financial stability. Additionally, you may need to evaluate whether to handle your marketing in-house or outsource specific tasks to professionals.

Once you have gotten started with the basics of marketing and have at minimum followed the 5-step process to start sending out content to your existing clients, and have successfully created your first opt-in to start growing your email list, you will have a better understanding of where you will need help.

Managing your marketing budget and resources will be an ongoing process, and this is again something more advanced that does not need to be in place before you can get started with the basics. Some of these steps will already be in place if you've been following along and have already started executing.

Marketing Budget Management

Here's a step-by-step approach to determine a marketing budget and allocate resources effectively:

Step 1: Set clear objectives

Start by defining your marketing objectives. What do you want to achieve with your marketing efforts? Common objectives might include increasing brand awareness, generating leads, or promoting specific financial services.

Step 2: Understand your target audience

Know your target audience well. Understand their demographics, behavior, and preferences. This knowledge will help you choose the most effective marketing channels to reach them.

Step 3: Assess past performance

Review the performance of your previous marketing campaigns. Identify what worked and what didn't. Use analytics tools to measure the success of various channels and tactics.

Step 4: Research industry benchmarks

Research industry benchmarks to understand how your marketing efforts compare to others in the financial industry. This can give you a sense of what's typical in terms of budget allocation.

Step 5: Determine available resources

Assess your available budget and staffing resources. Be realistic about what you can allocate to your marketing efforts. Consider both financial resources and the time your team can commit.

Step 6: Prioritize marketing channels

Identify the marketing channels that are most likely to reach your target audience effectively. This may include a combination of digital channels (e.g., social media, email, SEO), traditional marketing (e.g., direct mail, print ads), and in-person strategies (e.g., networking events, seminars).

Step 7: Budget allocation

Allocate your budget based on the prioritized marketing channels.

Some factors to consider are:

- **Cost Per Acquisition (CPA):** Calculate the historical or estimated cost to acquire a new client through each channel. Allocate more budget to channels with a lower CPA.
- **ROI expectations:** Estimate the return on investment (ROI) you expect from each channel. Allocate more resources to the channels that are likely to provide a higher ROI.

- **Seasonality:** Consider any seasonality or trends in your industry. Allocate budget accordingly, focusing more on channels that perform well during peak periods.
- **Testing:** Set aside a portion of your budget for testing new channels or strategies. Experiment with new approaches to see what works best.
- **Integrated marketing:** Ensure your marketing channels work cohesively. An integrated marketing approach can amplify your message and improve efficiency.

Step 8: Staffing resources

Assign the necessary staff to manage and execute your marketing campaigns. Consider the expertise required for each channel. If you lack in-house resources, you may need to outsource some marketing tasks.

Step 9: Monitoring and adjustments

Regularly monitor the performance of your marketing channels and campaigns. Use analytics to track key metrics and KPIs. Make adjustments based on what's working and what's not. Flexibility and adaptability are key to effective budget allocation.

Step 10: Review and refine

Conduct regular reviews of your marketing budget allocation and staffing resources. Assess the impact of your marketing efforts on your business goals and make refinements as needed.

Remember that budget allocation is not static; it should evolve as your business goals and market conditions change. Regularly reassess and

adjust your marketing budget and resource allocation to stay competitive and achieve your objectives effectively.

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Chapter 7: Compliance & Regulation

This wouldn't be a marketing resource for Canadian Financial Advisors, Planners, and Investment Managers if it didn't include a chapter on compliance and regulation.

It's your duty to ensure your marketing practices comply with all regulatory requirements within the financial industry. You are required to protect your clients' data and you can also build trust through a strong focus on privacy and security. When marketing financial services, transparent communication and disclosure are essential.

Staying Compliant with Industry Regulations

Compliance and regulations have a significant impact on marketing for Canadian Financial Advisors and Planners. They are subject to strict guidelines and rules designed to protect consumers and ensure ethical behavior within the financial industry.

Truthful and accurate information: Advisors must ensure that all marketing materials, including their website, social media profiles, and promotional content, provide truthful and accurate information. This includes making accurate claims about their services, qualifications, and the performance of financial products.

Client suitability: Advisors must adhere to the "Know Your Client" (KYC) and "Know Your Product" (KYP) rules. This means that marketing materials should be tailored to attract clients whose financial needs align with the Advisor's services and expertise. Advisors should not promote products or services that are unsuitable for their target audience.

Client confidentiality: Protecting the privacy and confidentiality of clients is of paramount importance. Any marketing content that mentions or references clients must do so with the utmost discretion and adherence to privacy laws.

Performance projections: Advisors must be careful when making performance projections about financial products. These projections should be based on realistic assumptions and not mislead clients or prospects.

Disclosure of fees and conflicts of interest: Transparency is essential. Advisors must clearly disclose their fees and any potential conflicts of interest, ensuring that clients understand what they are paying for and any factors that might influence advice.

Regulatory approvals: Certain marketing materials, especially those related to financial products and services, may require regulatory approval before use. Advisors need to ensure that their content complies with the regulatory body's guidelines and that it has been approved if necessary.

Testimonials and endorsements: If using client testimonials or endorsements in marketing, Advisors must ensure that these are genuine and compliant with regulations. They should not create a false impression of performance or results.

Record keeping: Compliance regulations may require Advisors to maintain records of their marketing materials, advertising, and communications with clients. These records are subject to regulatory scrutiny.

Client communication: All client communications, including those made through digital marketing channels, must adhere to regulations. This includes the use of encrypted communication for sensitive information.

Regulatory updates: Advisors need to stay informed about changes in regulations that may impact their marketing practices. They should regularly review regulatory updates and modify their marketing strategies as needed to remain in compliance.

Social media and digital marketing: Social media and online advertising are subject to specific regulations. Advisors must be aware of these rules when using digital channels to reach clients.

Failing to comply with these regulations can result in serious consequences, including regulatory fines, reputational damage, and legal issues. It's important to take a cautious and diligent approach to your marketing efforts, ensuring that all content meets compliance standards and aligns with the best interests of your clients. It's also advisable for Advisors to work with legal and compliance experts to ensure their marketing materials meet all regulatory requirements.

Currently, compliance and regulation in the Canadian financial sector are primarily overseen by organizations like the Investment Industry Regulatory Organization of Canada (IIROC), the Mutual Fund Dealers Association of Canada (MFDA), and provincial securities commissions.

IIROC and MFDA: IIROC regulates investment dealers and trading activities in Canada, while the MFDA governs mutual fund dealers. Advisors working under these organizations must adhere to their specific

rules and guidelines, which often involve investor protection, transparency, and ethical conduct.

Provincial regulations: Each province in Canada may have its own securities commission responsible for regulating Financial Advisors and Dealers. Advisors need to be aware of the regulations specific to their province.

Client protection: Regulatory bodies enforce rules that aim to protect clients from misconduct, fraud, and unethical behavior within the financial industry. Advisors are required to act in their clients' best interests.

Product regulations: There are rules and guidelines around the sale and marketing of financial products, ensuring that they are suitable for clients' needs and risk tolerance.

Disclosure and reporting: Advisors must provide clients with clear and transparent information about fees, charges, and potential conflicts of interest. Regular reporting on investment performance is also often required.

Continuing education: Advisors are often required to engage in ongoing professional development and education to stay up-to-date with industry changes and best practices.

Licensing and registration: Advisors must have the appropriate licenses and registrations to provide specific services or deal with certain financial products.

Content compliance: Ensure that the content produced complies with Canadian regulatory requirements, especially when discussing financial products and services.

Legal and ethical considerations: Always remember the legal and ethical responsibilities in your marketing, including client confidentiality and privacy protection.

Compliance training: Information on conducting compliance training for the entire team to ensure adherence to regulatory standards.

Compliance and Regulation are paramount in the Canadian financial industry, and understanding and adhering to them is crucial for the ethical and legal operation of Financial Advisors and Planners.

Summary

Throughout this Beginner's Digital Marketing Guide for Financial Advisors, Planners, and Investment Managers, there have been some consistent themes. You've been given the most basic steps to get started with email and content marketing, and we have covered more advanced topics such as Google Keyword Research and Analytics.

The goal of this guide is to provide independent Advisors and Planners with the actionable steps to:

1. Identify goals and target audience
2. Start creating content
3. Grow and nurture an email list
4. Create an online presence
5. Attract and convert ideal prospects with valuable content

We hope this has been a helpful and valuable resource for you.



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