

The Financial Advisor's Guide to

# Content Writing

DA digital agent

by  Veriday

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## Introduction

It's time to start creating content. But not just any content. We're talking about content that helps engage your prospects and clients, and shows off your expertise to help you build your online presence.

Writing valuable content that speaks to your audience is one of the most important things you can do. Content writing can be used to build your audience of clients, connect and engage with prospects, and establish yourself as an expert in the industry.

As the digital age grows, the value of content writing shows no signs of slowing down. Words are one of the most effective tools when presenting your business online, and writing content yourself adds that personal touch and trust factor to your business. This Guide to Content Writing provides actionable tips for Advisors on how to produce engaging content ranging from on your website to blog posts.

# CRM 2 and the Rise of Content Marketing

I'll start this post with a response from a Financial Advisor customer of ours (the name is hidden though for privacy reasons) in one of the surveys we performed.

**Question:** How can having a website with Digital Agent help you achieve your long term business goals?

**Response:** "There will be a thinning of the herd for Advisors in the coming years as the regulators will require everyone to disclose their fees. I'll need to prove to clients even more that I am worth their money."

**“CRM II raises the question of perceived value over price.**

The “thinning of the herd” is what this Advisor is referring to as the CRM 2 bill. The CRM 2 bill, is generating a fair bit of uncertainty and fear within the Advisor community. This is for a variety of reasons but one of those reasons is centred around how this will change and affect an Advisor's relationship with their customers.

By no stretch am I an expert on this subject but from what I've read, the bill is essentially a legislation, providing the requirement that Advisors provide complete transparency into the amount of money they make through their clients. The question is, why does this matter? Why do Advisors care that they need to do this?

In the end, in any business, the only time I can think of where this would be an issue really comes down to a question of value. Advisors worry that their clients will focus more on price than value. If I became fully transparent as to the amount of profit I made from a customer, I would only ever have a problem releasing this information, if I believed there to be a mismatch between

# CRM 2 and the Rise of Content Marketing

the perceived value of my product versus the actual price I charge for that product or if I had difficulty articulating the price and value discussion (or proving it for that matter).

CRM 2 raises the question of perceived value over price. In theory, Advisors who have strong and trusted relationships and who are undoubtedly confident about the value they provide to their clients should have nothing to fear. Advisors who have been reaping the benefits otherwise, should be, and rightfully wondering how to close the value and price gap. In my opinion, this is where content marketing should become such a critical part to any Advisors' business looking to overcome the ensuing difficult conversations they are about to have with their customers. Content marketing provides an opportunity for Advisors to show how much value they can provide and take the conversation beyond the price level.

If you don't have a website yet, I implore you, please, get one. It's no longer an option and you're one of very few who are still holding out.



***Content marketing provides an opportunity for Advisors to show how much value they can provide and take the conversation to the next level.***

## CRM 2 and the Rise of Content Marketing

Content marketing is often associated with things like email marketing. In actual fact, there's a growing movement around content marketing attempting to redefine and transform the entire digital marketing space. Content marketing is a method that individuals, groups, companies and/or organizations use to build trust with possible buyers of their product or service. It is most associated with blogging and should be core to any small to large business' marketing strategy.

***“...before picking up the phone and calling you, they've already decided what they want to do with you and your business.***

Here's a key fact for anyone in marketing: 70% of all shoppers do their research online before making a purchase decision. What does this mean? This means that before this group of 70% pick up the phone, they're already doing all of their research online. This means that before picking up the phone and calling you, they've already decided what they want to do with you and your business. If I picked up the phone today and attempted to cold call a random sample of 10 possible buyers, the only scenario that ends up with a purchase is the one where they've already decided to buy my product or service. The question for you, the Advisor is, have they made a decision to buy a product or service through you? And if not, why?

# CRM 2 and the Rise of Content Marketing

Ultimately, and especially in today's digital age, purchase decisions undoubtedly and ultimately come down to one thing: TRUST. That shouldn't surprise you. But then, how do you build trust, when 70% of shoppers do all of their research online before making a buying decision? This is the question that still baffles many business owners today. Traditional marketing tells you that advertising eventually leads to a conversation that you can have with a prospect or buyer. The problem with traditional marketing is that the buyer is already having the conversation with anything they can find online, about the product or service they are planning to purchase. Content marketing attempts to address this exact "problem".

Content marketing is fundamentally about building trust with potential or existing customers and doing it on a platform that can be viewable by everyone. It's about answering questions that are typically asked by customers in the Financial Services industry. While so simple, building trust starts with that fundamental principle: answering customer questions and helping to solve their challenges.

***"The buyer is already having the conversation with anything they can find online, about the product or service they are planning to purchase.***

# Write Creatively and Be Entertaining

The beautiful thing about the web is that everyone can write and have an equal chance at being read. The not so good thing about the web is that everyone can write and not be read. The bottom line? Anyone can write and present information to an audience but, does it captivate the reader. Why is this important?

The use of simple language increases your chances to be found and connect with your audience. Getting found is certainly the first step in any digital marketing strategy, and connecting with your readers is even more important. However, if that content is dull, uninteresting and doesn't truly reflect your passion for the subject matter, you're likely to lose your audience either once or forever.

The web is vast and contains an enormous amount of content, and there's always going to be better content. Being creative and writing in a way that is entertaining, will keep visitors on your site and will also keep them coming back. It's a way to set yourself apart from other similar websites, but more importantly, it's a way for you to channel your interest and passion for a particular subject matter.

Finish your writing exercise by doing a gut check and read the article back to yourself.

***“Getting found is certainly the first step in any digital marketing strategy, and connecting with your readers is even more important.”***

## Read Your Content Out Loud

One useful method that I use when writing content is to read it out loud. It helps me acquire a different perspective on what I've written and also helps me check to see if what I've written is long winded or repetitive. I'll often ask friends or my peers to either read it out loud or I'll read it out loud to them and get their feedback on how it sounds and whether they understand the points I am trying to articulate.

Written word versus spoken word are two very distinct elements. When writing, we tend to structure our thoughts differently on paper than when we speak. Use this easy and quick method to ensure you are speaking to your audience as if they were sitting right beside you.

***I'll often ask friends or my peers to either read it out loud or I'll read it out loud to them and get their feedback...***

# Write Your Content Using Plainspoken Language

Ok, I'll admit it. When I was younger, I was what a lot of people viewed as being a "techie"; socially awkward and, at times, perceived to be speaking a different language. When I entered the working world, I observed that I experienced a similar kind of situation. One of my first jobs was in technical support. "I don't understand what you are saying" was a common phrase I heard because most of the time, I was speaking to someone who didn't have a background in technology.

**“  
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Knowing your audience is a key part of communication and, more importantly, content writing for the online world. What happens when you start using language that only a finance or economics major would understand?

Poor choice of language can lead to some interesting consequences. In my personal use case, I would lose the customer's attention and trust. Naturally, they start wondering whether you're the right person for the job.

Speaking and writing in simple, plain terms can lead to increased trust because you're relating to them as clients who are not experts in your field.

# Write Your Content Using Plainspoken Language

There's an interesting article online (part of the Invesco White Paper Series), "New Word Order" that I would recommend you read. The essential theme of the study demonstrates that the average investor isn't interested to learn about all the complex language that you're using. They just want to know whether they're achieving their goals and whether their money is safe.

If I extend this theory to the online world, I would bring it all back to search. The trick to keyword search and being found, is essentially guessing what common search words would be used.

So if you're prospects and customers don't understand what you're saying, what makes you think they'll be searching for you using the same language?

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***"So if your prospects and customers don't understand what you're saying, what makes you think they'll be searching for you using the same language?"***

# Great Content Leads to Revenue

Digital marketing success is often associated with the features or robustness of a particular technology. This assumption is largely incorrect and the tools you are using should merely facilitate the execution and delivery of your marketing strategy. Ultimately, digital marketing success, in fact, marketing success is quite simply defined as what it can deliver to your bank account.

Achieving digital marketing success hinges on one primary factor: content. An amazing looking website, along with thousands of tweets, combined with regular eNewsletters is guaranteed to deliver you zero results if your content isn't written effectively or frequently. This is why digital marketing leaders aren't necessarily the same ones using the best tools or technology or the same ones blasting you with pages and pages of irrelevant content.

So, how do you define digital marketing success? Personally, coming from a business development background, it's got everything to do with results. Are you generating more followers? Are you experiencing an increase in visitor traffic? Do your visitors stay longer on your website? And the most important question, have you acquired a new customer through digital marketing? In short, digital marketing success = tangible and measurable business results.

Are you up for the challenge?

***“Digital marketing success hinges on one primary factor: content.”***

# Advisors: Writing for the Web Creates 4 Marketing Benefits

How can writing for the web enrich your Financial Advisory business? A Financial Advisor who publishes a newsletter gets a call: "My friend just sent me a link from your newsletter. My wife is planning to retire, and we want to make the best use of those assets, consistent with our family goals. Can we all get together?"

This story shows several marketing dynamics specific to the web: Easy broadened distribution that can create unexpected business leads; web analytics that enable the Advisor to see which newsletter stories were clicked and any that were clicked multiple times; and an additional information source when preparing for meetings. Because newsletter links drove traffic to the Advisor's site, the prospect had easy access to further information that confirmed his positive impression and led to his call.

Writing for the web may require adaptation of traditional marketing channels like brochures, but the rewards are well worth your effort. Here are the challenges and how to meet them successfully.

## **Special challenges of writing for the web**

### *Challenge #1: Grab readers immediately*

What drives readers most is timely information that's communicated clearly in the title of your post. The Advisor in the opening anecdote had written about a new regulation related to taxes. Quick publishing via the web speeded timely communication to clients.

Make your content easy to look at, with short paragraphs, headings and sub-heads that state your content clearly, and layout that makes information flow and location of specific topics easy to grasp.

# Advisors: Writing for the Web Creates 4 Marketing Benefits

## Challenge #2: Use images

[Research](#) has shown that the web is essentially a visual medium. Images attract viewers more than plain text.

If, like me, you're a "word person," thinking visually can seem daunting. I always envied people who could draw clear diagrams of complex processes, while I required what seemed like too many words. The good news is that, as investment professionals, you're familiar with potentially the most compelling pictures for your audience: data visualization in charts.

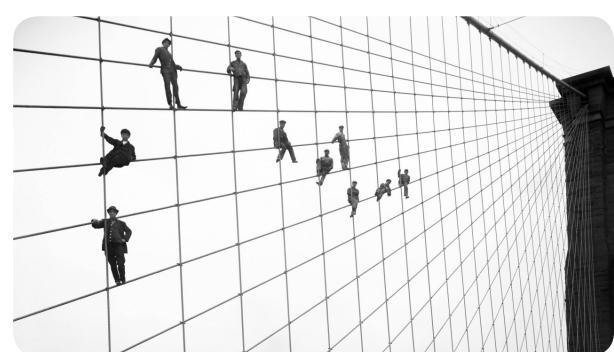
Effective charts use [interpretive titles](#) that state the main idea, or story, of each one clearly and are accurate and faithful to your data.

If you enjoy taking pictures, include your own, either to personalize your site (e.g. show the photos in your office) or to illustrate your content. Your own photos are much more effective than stock photos of, say, the generic "meeting."

Another effective way to use images is to provide a visual metaphor for what you're talking about.



I'm not a good photographer, but I love art history and enjoy using paintings and photographs in my posts, especially as metaphors. Painters suspended on Brooklyn Bridge cables in 1914 means "risk" to me.



# Advisors: Writing for the Web Creates 4 Marketing Benefits

Because finding inexpensive, easy-to-use image sources with a good selection is a perpetual quest of everyone writing for the web, social media experts frequently [recommend their favorites](#). I've used Dreamstime.com and 123rf.com. Trustworthy sources will explain copyright and other legal restrictions on images. Be sure to respect copyright. Providing attribution of images you use is a nice touch, whether or not it's required. This post supplies details as a hyperlink ("Image Source").

## *Challenge #3: Distinctive brand "voice"*

Write conversationally, referring to your own interests—family, leisure activities—to the extent that you're comfortable, using plain English to discuss financial concepts.

A sure way to make your voice distinctive is to follow up insights from your web analytics. Are you compiling bookmarks on a social media site? Include these ongoing updates in your newsletter. If newsletter analytics show an unexpected increase in the number of clicks on a bookmark or section of your newsletter, explore the

subject in a blog post or future newsletter item, mentioning that this is your response to client feedback.

The opportunity to develop and distinguish your own voice is a good lead-in to the significant benefits of writing for the web, which are interrelated results of information accessibility and communication speed.

## **Four Benefits of Writing for the Web**

### *Benefit #1: Enduring presence and broader potential audience*

The opening anecdote shows that easy distribution of information on the web broadened the Advisor's potential prospects by building service awareness and providing easy access to further information that confirmed the prospect's favorable impression and motivated his call.

Have you ever lost a potential sale because the prospect lost the information you sent? Marketing on the web means that your posts remain available through search and referred links to existing clients, targeted prospects, and browsers. Your goal is to drive traffic to your site. The more you post

# Advisors: Writing for the Web Creates 4 Marketing Benefits

to the web using multiple channels like your newsletter, blog, or social media sites like Twitter, the more people will find you.

*Benefit #2: Extended marketing scope through easy sharing of posts*

We saw sharing from friend to friend. Another way of sharing content is through social bookmarking sites like Delicious.com, which I've used for years to compile annotated lists of content recommended to clients. Here's an example:

4 Reasons Why Financial Advisor Websites Struggle | IRIS www.iris.xyz  
Advice about "long tail" keywords is especially valuable. Post by @AndrewTCung  
1 1 website financial-advisor SEO

Copyblogger: Do You Have What It Takes to Publish a Curated Email Newsletter? [Infographic] copyblogger  
Curation, selecting information useful to your audience and saying why it is valuable, is an excellent way of establishing your expertise and becoming a "go to" person. I use Twitter primarily for curation. Why not do both? People have preferences among communication channels. Gathering several curatorial tweets and sharing them periodically via your newsletter is an excellent way to reach everyone--and a great way to repurpose your content! Post by @demanfarmworth.  
7 7 email commchannels newsletter curation

Although all you need to post on Delicious is the URL, stating what benefits in the content led you to share it, as is done in the example above, is a greater service. Delicious.com also enables you to sort content by topic using tags, which can be bundled into groups, for example "Retirement." Clients and prospects given access to your public account (I have a private account for my use and a public account with a different username) can find what they need easily and become aware of new issues related to them and additional services you offer.

*Benefit #3: Enhanced lead capture through offers of free content*

What's best for you about writing for the web? You can "repurpose" your content, turning it into a free offer available to readers who provide contact information requested.

# Advisors: Writing for the Web Creates 4 Marketing Benefits

Are you thinking of posting content that focuses on various stages of investors' life cycles and includes the questions they should ask at each stage? Post it as a series, making readers aware of the series and future installments on your site, newsletter, and blog. When the series is complete, collect the installments and make them available as a free offer to visitors to your site and readers of your newsletter and blog.

Include a Call to Action with each free offer: e.g., "Are you making a transition to a new phase of your financial life? Click here to get a free copy of 'Be financially prepared for all stages of your life."

*Benefit #4: Varied content that shows what working with you is like*

Services, unlike products, are experiential. Although clients can look at investment performance, they can't take you home for a free trial. How to deal with this? The best answer I've found is to use your writing to simulate the experience of working with

you as an Advisor. Establish your distinctive voice through conversational analyses of market or regulatory events, explaining in plain language who they matter to and why.

Bring the words of your investment philosophy and practice values to life with stories showing how you helped clients fulfill their goals while staying within their comfort zone for risk: Parents funding children's education; adults with financial resources to start a business, buy a home, or fund dreams of travel during retirement.

As you develop your sites and newsletters or blogs, you'll want to try new marketing strategies and forms of content. To help you move ahead, here's an excellent glossary of social media terms, with clear definitions and just the right amount of irreverence.

# Help your Advisors connect. Adapt. Stay in compliance. Grow their assets under management. 24/7

Digital Agent is a Compliance and Marketing Platform to help you more easily manage all of your Advisor digital marketing

## With Digital Agent:

- Review time drops from weeks to days – your Advisor newsletters, websites and blogs can be fresh and topical.
- Advisors get a high quality content library – making client connection easy.
- Auditing is simple and sweet – the way it's meant to be.
- Web analytics show your Advisors what's working for them. And show you what's working for your Advisors.
- When there are changes to Google algorithms, privacy laws, your logo, or regulations, your unified platform makes adaptation easy.

You might also be interested in the e-book:

Are your Investment Advisors set up for success?

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by Veriday

Toronto, Canada  
1.888.706.2817

[questions@digitalagent.com](mailto:questions@digitalagent.com)  
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