Delaware Life®

Marketing Strategies for Financial Advisors: 6 Tactics That Deliver



Key Takeaways

A digital marketing plan helps you differentiate yourself by showcasing your unique value proposition and expertise in financial planning.

Set SMART goals that are specific, measurable, and tied to outcomes that move your business forward.

You don't need to market to everyone. You need to market to the right people.

Be consistent and track your success.

Marketing your advisory practice doesn't require a full-time marketing team or a big budget. It just requires focus, consistency, and tools that work. This guide will help you build a plan that reflects your goals and supports your client relationships.

Why A Digital Marketing Plan Is Important for All Advisors

Having a digital marketing plan is crucial for all financial advisors aiming to enhance their visibility and reach their target audience effectively. A well-defined digital marketing strategy allows you to:

- Leverage social media, search engine optimization, and content marketing.
- Build a solid foundation for client retention and referrals.
- Create valuable content, such as educational blog posts and webinars, that resonate with your specific audience.
- Efficiently allocate your marketing budget to ensure your efforts are impactful and measurable.

Ultimately, a digital marketing plan empowers you to differentiate yourself in a competitive market, showcasing your unique value proposition and expertise in financial planning.

Build a Better Marketing Plan: A Guide for Financial Advisors

Most advisors know they need to market their services. But knowing where to start — and how to keep it going — can feel overwhelming. This guide was created for advisors like you with practical steps, tools, and inspiration to help you build a marketing plan that fits your business — and your bandwidth. Before jumping into a new marketing plan, consider auditing what you already have. You might be able to reuse resources you've already created, or update and refine them based on the marketing plan you devise.

1 Set SMART Goals for Growth

Marketing doesn't work without direction. Start by setting goals that are specific, measurable, and tied to outcomes that move your business forward. Try using the SMART framework, which stands for:

- Specific
- Measurable
- Achievable
- Relevant
- Time-bound

Align your SMART goals with your overall business objectives and track your progress to stay motivated.

SMART Goal Example

Goal: Review my current book of business and reposition underperforming assets in fixed income vehicles to fixed index annuities (FIAs) to help diversify portfolios.

By the end of Q3 2025:

- Identify 10 qualified clients aged 55–70
- Conduct at least three one-on-one review meetings each month
- Use Delaware Life's product brochures for follow-up.



SPECIFIC

Focused on FIAs and clients near retirement age.



MEASUREABLE

- Target current book of business
- Identify 10 qualified clients
- Have 3 meetings each month.



ACHIEVABLE

Grounded in tools already available—no bells and whistles.



RELEVANT

Aligns with current client interest in low-risk, high-value retirement solutions.



TIME-BOUND

To be completed by the end of Q3.

2 Understand Your Ideal Client

You don't need to market to everyone. You need to market to the right people. Take time to define your ideal client by jotting down traits like:

- Age, profession, income range, risk tolerance
- Financial goals (e.g., retirement planning, asset protection)
- Communication preferences (email, in-person, webinars)

Client Profile Example for a Female, Aged 63



Profession: High school administrator (recently retired)
Household Income Range: $90,000–$125,000 (from pension + part-time consulting)

Financial Goals:

- Protect principal while earning steady returns
- Establish a guaranteed income stream starting at age 68
- Leave a legacy for her two grown children

Communication Preferences:

- Email for updates and documentation
- Quarterly in-person meetings with her advisor
- Occasional educational webinars when available

3 Clarify What Sets You Apart

Your value proposition is about clarity: What specific problems do you solve? For whom? And why does that matter? Having a defined marketing strategy enables you to create relevant content that resonates with your target audience and enhances your credibility.

Think beyond product mix. Ask yourself:

- Do I bring emotional intelligence into client conversations?
- Do I simplify complex subjects in a way my clients understand?
- Do I specialize in a niche that sets me apart from my competition?
- What specific outcomes do I help clients achieve?

4 Choose the Right Channels and Be Consistent

Consistency is more important than perfection. Develop a content calendar (30, 60, or 90 days and stick with it. Focus on the channels where your audience already spends time.

Email Marketing

- Start a simple newsletter: 2-3 short sections using client-friendly language
- Include educational pieces, quick market updates, or FAQs you commonly hear from clients
- Automate where possible to maintain regularity

Social Media

- LinkedIn is especially effective for advisors in independent or bank channels.
- Post 2-3 times per week, blending original insights with curated articles.
- Share educational content to help prospective clients navigate financial challenges.
- Tell short client success stories (with compliance approval) to create personal connections.
- End posts with an open-ended question to invite audience engagement.

Webinars & Workshops

- Focus on timely topics like retirement readiness, tax-efficient withdrawals, or market volatility.
- Keep webinars under 45 minutes to maximize attendance and attention.
- Record sessions and repackage key takeaways into social posts or downloadable guides.
- Incorporate polls and Q&A sections to make sessions interactive.

Delaware Life's National Sales Consulting Team will work with you to deliver client-approved presentations on a range of topics. Explore our offerings and reach out to your local wholesaler or visit delawarelife.com for more information.

Referral Networks

- Develop a script for naturally asking for referrals during client review meetings.
- Create simple "thank you" templates for clients who refer friends or family.
- Partner with CPAs, estate attorneys, and other professionals for cross-referral opportunities.

Consider the following example of how you might work asking for referrals naturally into a conversation with an existing client:

"I really appreciate the trust you've placed in me to help guide your retirement planning. It means a lot. One of the things that helps me serve people like you even better is working with others who share similar values—folks who want straightforward advice and solutions they can rely on.

If you have a friend, colleague, or even a family member who's unsure about their retirement strategy—or just wants a second opinion—I'd be happy to talk with them. No pressure, just a conversation. Does anyone come to mind?"

Consistency builds credibility—and credibility builds business.

5 Track What Matters (Without Overthinking It)

You don't need enterprise-level analytics. Start with what you can manage.

Track simple key performance indicators (KPIs) like:

- New leads or inquiries generated by specific campaigns
- Client interactions resulting from marketing activities
- Open and click rates on email campaigns
- Website traffic spikes related to content publication
- Number of social media engagements (likes, comments, shares)

Once you identify a few key activities that generate positive engagement, focus your resources there. Document your learnings quarterly to identify trends and sharpen your future strategy.

If budget allows, lightweight tools like HubSpot Starter, Mailchimp, or Google Analytics can offer accessible insights without overwhelming complexity. Focus on progress, not perfection.



Remember: It's better to track fewer metrics accurately and act on the insights, than to get overwhelmed by too much data with no clear action plan.

6 Hit The Ground Running with the Right Questions

Digital tools help keep you top-of-mind, but the real magic happens in conversation. Ask good questions in both your marketing and your client meetings. As Colin Lake, President & CEO at Delaware Life Marketing, puts it when discussing communication during times of volatility:

"The right question is the one that gets your client talking in a logical, personal way. It's not, 'Does volatility impact your investing?'—because of course it does. It's, 'How is this volatility impacting your thinking right now?' That one word—'how'—opens the door to a real conversation."

What About Compliance?

Compliance is a real concern. But there are ways to make the process more efficient.

Quick tips:

- Use pre-approved content when possible
- Avoid performance claims and testimonials
- Build a review process into your workflow
- Reach out to your broker-dealer or IMO if you need clarity

Final Thoughts: Start Simple, Then Scale

You don't need a perfect marketing engine to grow your practice. You just need to start.

- Show up consistently.
- Share what you know.
- Ask better questions.
- Use tools that match your time and energy.

And when you're ready for more, your Delaware Life team is here to help—with practical tools and products built with your clients' needs in mind.

Visit **delawarelife.com** to explore our full spectrum of products and solutions.

Disclosure

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