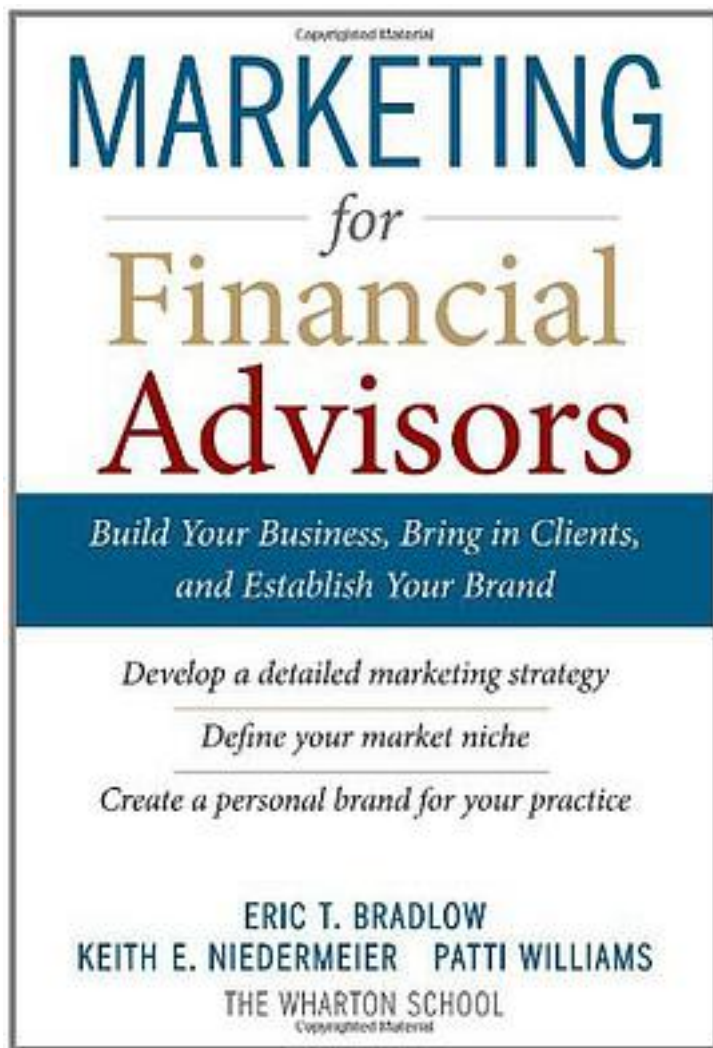


Marketing for Financial Advisors



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To financial advisors who ask, "Who has the time and money for marketing?" the authors have an important piece of advice: Treat your practice like a small business, or you will be put out of business. In an economy in flux, prospective clients are hesitant to put their financial future in the hands of just anyone. This is where Marketing for Financial Advisors comes in. The definitive marketing book designed specifically for financial advisors, it provides all the basic marketing skills you need to attract high-net-worth clients quicker and in greater numbers than ever. Putting the authors' proven techniques to use, you can immediately build your client base by:

- Establishing brand and reputational awareness
- Developing a differentiated value proposition
- Creating a "word-of-mouth" army
- Understanding your clients' psychology
- Focusing on a niche segment of clients
- Building a sophisticated marketing campaign
- Writing an effective marketing plan
- Determining the ROI of your marketing spend

Faculty members of the Wharton School's marketing department, the authors base much of their advice on a study of more than 800 financial advisors. Throughout the text, proven marketing approaches are combined with real-world insights from these successful advisors. Marketing for Financial Advisors opens the door to an entirely new perspective on your business. You will begin to view yourself as an entrepreneur and understand that an investment in marketing is an investment in the future of your business. Whether you already run a successful financial advisory firm or plan to start one, you must build customer relationships through marketing if you want to survive and profit for years to come. Take your first steps as a small-business entrepreneur using Marketing for Financial Advisors as your guide.

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