

MARKETING MADE EASY

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Advisor Success | Market Research | Monthly Updates



How to Make the Most of Your Marketing Strategies During an Up Market

The stock market hit new record highs recently and has been on the upswing ever since the Federal Reserve signaled they were finished raising short-term interest rates. Whenever the market rises, investors become more optimistic, and it's crucial for advisors to capitalize on this positive sentiment in their marketing.

Naturally, our messaging will be different from advisors who specialize in growth-based financial strategies. But as income specialists, we can still leverage an up market to remind people that it creates a good opportunity for them to reduce their risk ahead of retirement. That's because by taking money out of the market now to invest more conservatively, they will be "selling high" which is the goal of good investing.

Make sure you're keeping your marketing schedule full, while actively connecting and engaging with prospects through a variety of strategies, including:

Educational Content

Providing educational content is always a powerful way to engage with clients and prospects. Use blog posts, webinars, or informative videos that explain the dynamics of a rising market, potential opportunities, and strategies for taking advantage of them. By positioning yourself as a knowledgeable resource, you not only provide value to your audience but also establish credibility in the eyes of potential clients.



Emphasize Long-Term Goals

During periods of market growth, there's a tendency for investors to focus on short-term gains. However, advisors can differentiate themselves by emphasizing the importance of long-term financial planning. Illustrate how your services go beyond capitalizing on market trends and instead focus on building sustainable, diversified portfolios that align with clients' overarching financial goals. As Income Specialists, we differentiate ourselves in this way all the time, of course, but a strong market creates an opportunity for our message to resonate even more powerfully.



Utilize Social Media

As you know, social media is an invaluable tool for reaching a broader audience. Leverage your social media pages now to share market insights, tips, and success stories. Engaging with your audience on social media allows you to build a community around your brand and establish a more personal connection with potential clients.

Host Live Educational Events

Now is a great time to host as many seminars and workshops as you can because the stock market is making headlines and people are already thinking a lot about their finances ahead of tax season. As you know, these events provide an opportunity to network, build relationships, and showcase your unique expertise as an Income Specialist.



Conclusion

When the financial markets experience an upswing, advisors must adapt their marketing strategies to align with the prevailing sentiments and emphasize the proper messaging for their business model. By doing this, we can effectively position ourselves as Income Specialists uniquely qualified to educate investors in or near retirement about how to best take advantage of an up market to better ensure they can achieve their long-term goals.





MONTHLY MEGAHIT

Shane Percy

Each month we like to feature an advisor who is doing exceptional work. This month we are featuring Shane Percy. As an Investment Advisor Representative, he offers a variety of products that can help clients meet several insurance and financial needs, including Medicare, college funding, retirement, long-term-care costs, and lifetime income strategies.

Shane takes pride in cultivating strong relationships with clients, helping to ensure their needs are met with the utmost care and attention. Born and raised in Murfreesboro, TN, he still calls this vibrant community home.

Primary Coach Rick Bates had this to say:

"I have had the pleasure of coaching with Shane for a couple of years now as he has been a sub-agent of another's business. Shane has learned the process well over that time and has had much success. In fact, Shane just recently opened an office of his own. Congrats, Shane!"

Well done, Shane, and congratulations on your continuing success!