Advisor360° | fmg

Delighting clients along the entire advisor-client journey

Advisor360° and FMG—Partnering to deliver end-to-end solutions for marketing, onboarding, and enduring advisor-client relationships

→

How advisors acquire clients, onboard them, and deepen relationships

Attracting new clients, getting them happily onboarded, and keeping them engaged over time is no easy feat for enterprise wealth firms. Cold calls are a thing of the past and even client referrals aren't as inevitable as they once were. According to Advisor360° research, advisors still acquire most of their new business from referrals, but those with modern technology were 33% more likely to say their clients would recommend them.[1]

It's clear that technology plays a leading role in building new business and keeping clients satisfied. In fact, 93% of advisors who rate their tech as modern or state-of-the-art gained new clients from competitors.[2] Meanwhile, mobile applications and social media tools are considered "must have" by advisors looking to build and sustain new business.

As demographics shift, wealth advisors need to meet clients and prospects where they are and have tools to satisfy both older individuals and next-gen prospects. Regardless of their age, clients want to collaborate more with their advisors in the financial planning process, which is beneficial to advisors in deepening the advisor-client relationship.

The bottom line is that we're seeing a straight line from technology to client acquisition and retention in wealth management. Leading-edge tools and technology yields satisfied clients and a robust pipeline of new business.

In this eBook we will explore how financial advisors can leverage Advisor360° and FMG's capabilities to acquire new clients, onboard them, and deepen their relationships.

Mobile and social tools for marketing[3]:

41%

of advisors use mobile devices for marketing and new business

68%

use them for client communication

64%

of advisors said LinkedIn should be integrated into their tech platform

63%

said the same for X (Twitter)

0%

don't want social media access at work

[1]2022 Connected Wealth Report, Advisor360° | [2]2024 Connected Wealth Report, Advisor360°
[3]2024 Connected Wealth Report, Advisor360° | [4]2024 Connected Wealth Report, Advisor360°

Table of contents

Client journey case study

Prospective Clients

Buying a first home

Client journey case study

Buying a First Home

Alex and Jessie, both 32, want to start a family and are ready to buy their first home. They heard from a friend that a financial advisor can help put together their first financial plan and set them on a solid foundation so their family can grow. They've begun searching for an advisor that's the right fit for them and in doing so, discover your website.

Establish a relationship →

Assess their situation and present recommendations →

Open accounts efficiently and transparently →

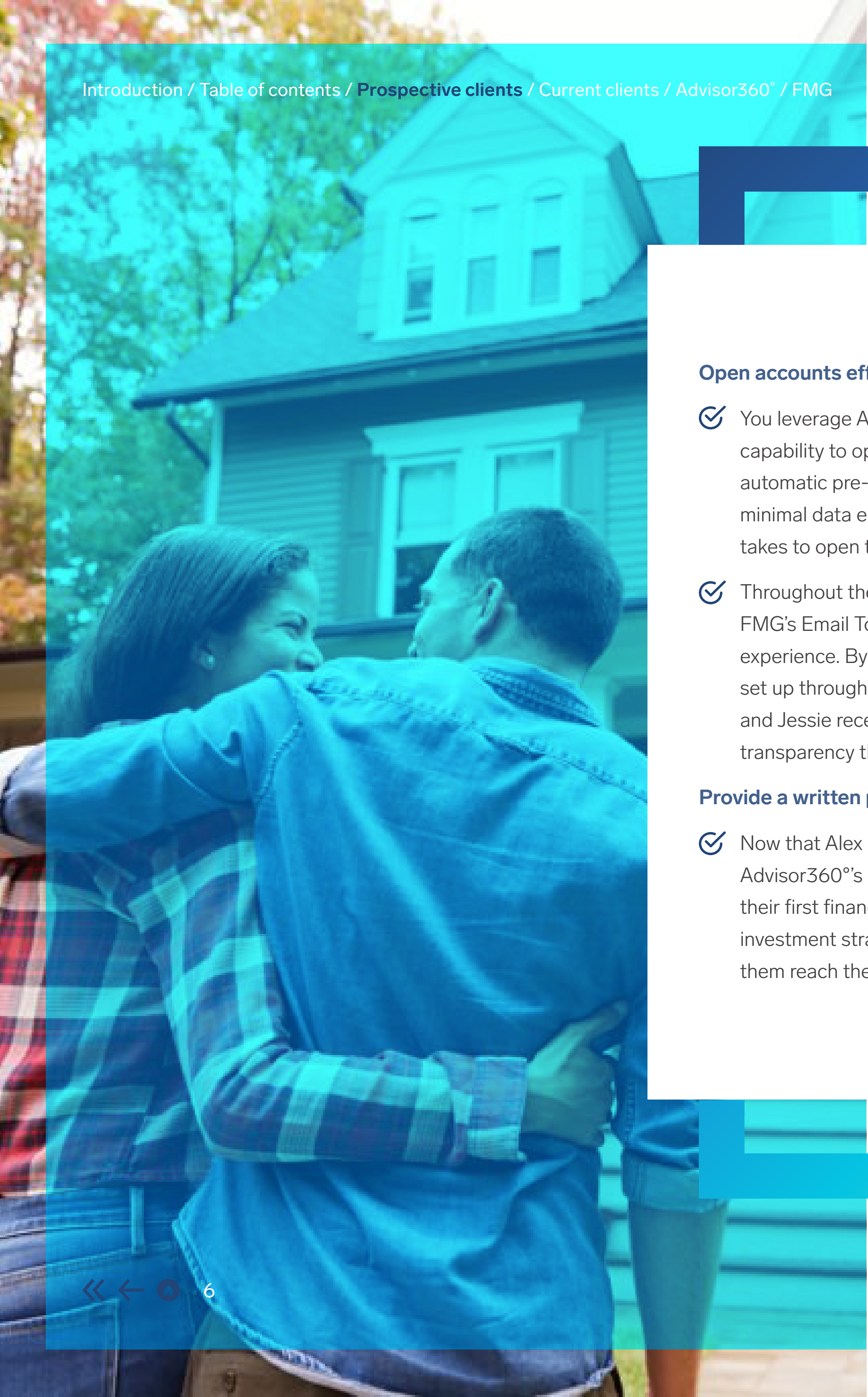
Provide a written plan on how to achieve goals →

Establish a relationship

- Using FMG's Web Experience, you are able to leverage website best practices so that your firm's web design and copy are tailored to first-time home buyers and young couples, helping Alex and Jessie self-qualify for your services.
- Since you've created a robust social media presence using FMG's Social Media Tools, Alex and Jessie find relevant content when they look you up on LinkedIn. They read through the client referrals you've procured from your existing network and decide to schedule a call with you.

Assess their situation and present recommendations

- Prior to your first meeting, you have Alex and Jessie log in to Advisor360°'s Client Portal, keeping them engaged from the start by collecting profile and account information. The data entered via the portal is immediately available to you.
- During your first meeting, you introduce them to Advisor360°'s WealthGuide®. This living financial plan displays your full value as an advisor beyond just investment or insurance planning. They see how you put their interests first and can help them achieve their goals, and they decide to select you as their financial advisor.



Open accounts efficiently and transparently

- You leverage Advisor360°'s Digital Onboarding capability to open Alex and Jessie's account. It uses automatic pre-fills and forms that require just the minimal data entry, dramatically reducing the time it takes to open their account.
- Throughout the account opening process, you utilize FMG's Email Tools to provide a smooth onboarding experience. By using automated email sequences set up through the FMG dashboard, you ensure Alex and Jessie receive timely communications, providing transparency throughout the process.

Provide a written plan on how to achieve goals

- Now that Alex and Jessie are onboarded, you use Advisor360°'s Proposal Generation tool to develop their first financial plan. You set them up with an investment strategy based on their risk profile to help them reach their goal of buying their first house.

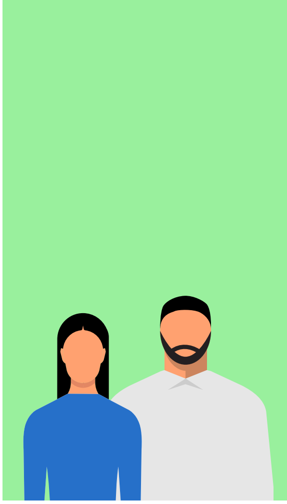
Turning Alex and Jessie from **prospects into lifetime clients** is a process that's made possible with tools designed to help advisors meet their needs every step of the way.

The best part? It's a repeatable process that gives advisors a way to create and customize a plan to meet each prospect's individuals goals while setting the stage for their full financial future.

Client journey case study

Current Clients

Planning for college



Client journey case study

Planning for College

Chris and Susan, 43 and 45, have been your clients for close to a decade. They have a 10-year-old son and want to open a college savings account. They know there are numerous options , but they are not sure which is the right one for them.

Provide ongoing service to keep clients on track →

Ensure advisor-client communication is how clients want it →

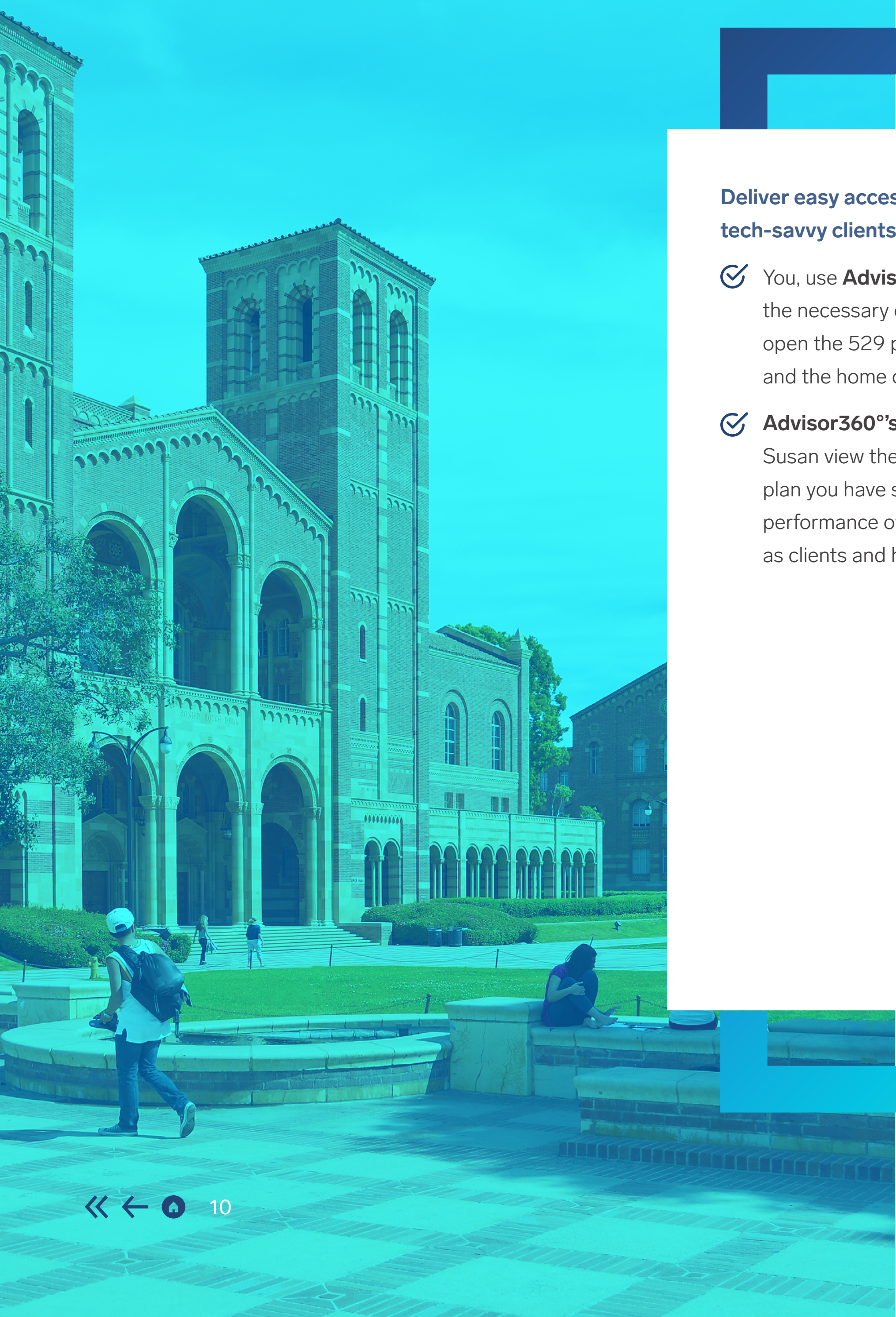
Deliver easy access to account information for tech-savvy clients →

Provide ongoing service to keep clients on track

- **FMG's Mobile App** sends you a notification that there's new content to share with your clients—there's been a major rule change to 529 plans. Knowing that you have clients, like Chris and Susan, with young children, you include this content in your monthly email and publish it on social media.
- You add the 529 plan changes to your monthly email using the automated sequences in **FMG's Email Tools**, ensuring that Chris and Susan receive relevant communications based on their interests.
- You leverage **FMG's Social Media Tools** to create a campaign around the 529 plan rule changes to push it out to your network. FMG's premade campaigns and their Canva integration make this easy to roll out.

Ensure advisor-client communication is how clients want it

- Chris and Susan receive your monthly email and read how a 529 plan can not only help them save money for their son's education, but now they can also move any unused funds into his Roth IRA and jumpstart his retirement savings. You receive a notification from **Advisor360°'s Secure Messaging** that they have reached out to learn more.
- During your meeting with Chris and Susan to discuss opening a 529 plan, you pull up **Advisor360°'s WealthGuide** so that you can view your notes on them. You read that their son, Ryan, is 10 years old and loves basketball, so you ask them who his favorite team is and if he wants to play in college.



Deliver easy access to account information for tech-savvy clients

- You, use **Advisor360°'s Document Vault** to share the necessary documents with Chris and Susan to open the 529 plan. They sign all the paperwork, and the home office opens the account for them.
- **Advisor360°'s Client Dashboard** lets Chris and Susan view their accounts, including the 529 plan you have setup for their son, and review its performance over time. This keeps them engaged as clients and helps build trust.

You may have many clients who are like Chris and Susan—and they are counting on you to help them meet their financial milestones, prepare for their financial future, and ultimately build the legacy they leave for their children.

The secret to a long-lasting advisor-client relationship is **building trust** with ongoing communication tools and capabilities that enable **integrated, holistic views** of your clients' complete financial lives.

Advisor360° + FMG

Our partnership

"Together, FMG and Advisor360° provide the accessible solutions that financial professionals need to grow and market their businesses. The secret sauce is leveraging data and technology to customize the client experience like never before."

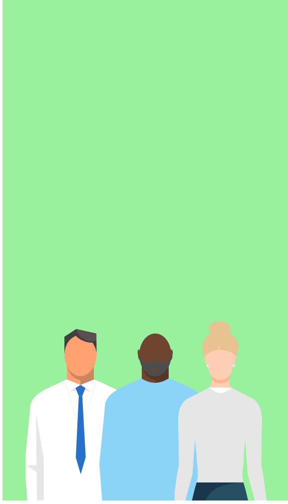
Susan Theder, Chief Marketing & Experience Officer, FMG

"From prospecting to onboarding, Advisor360°'s flexible wealth technology platform and FMG's all-in-one marketing suite come together seamlessly to provide the ideal solution to help advisors market authentically and effectively across channels."

Cynthia Stephens, Senior Vice President, Advisor360°

Advisor360°

Tools and capabilities



Advisor360° Tools and capabilities

Connected experiences for advisors, clients, and your home office staff

Advisor360°'s flexible wealth management platform ensures enterprise firms and their advisors are more productive, enhancing growth and advisor satisfaction. Our multi-custodial and cross-asset solutions enrich and integrate data from all financial products from annuities to investments to insurance in a single dashboard that helps inform business decisions. Our suite of solutions—which can be integrated one capability at a time or as a fully-configurable platform—features three distinct connected experiences:

1 Advisor Experience › 2 Client Experience › 3 Home Office Experience

They deliver an easy-to-use interface with the features, capabilities, and integrations required for the specific needs of each user.

Our connected wealth experience allows advisors to manage and grow their book of business in one place, and includes:

Advisor360° Proposal Generation

- Enables advisors to deliver a recommended investment strategy to clients based on their risk profile and investment objectives.

Advisor360° Digital Onboarding

- Provides advisors with a simple, fast, and reliable way to onboard clients, including multi-account opening within a household, and onboarding large numbers of new accounts at one time.

Advisor360° WealthGuide

- Allows firms and their advisors to create customized financial plans starting with templated content. It becomes a living financial plan that allows advisors to take a more holistic approach, displaying their full value beyond just investment or insurance advice. WealthGuide covers an array of planning topics to serve individuals and families at every stage of their financial lives.

Advisor360° Document Vault

- Allows advisors, the home office, and clients to securely collaborate by sharing documents. Our client experience provides advisors with integrated, comprehensive views of their clients' complete financial lives through a simplified interface.

Advisor360° Client Portal

- Provides end-clients with a holistic view of their portfolio of investments, insurance policies, financial plans, and outside accounts, fostering digital collaboration with advisors.

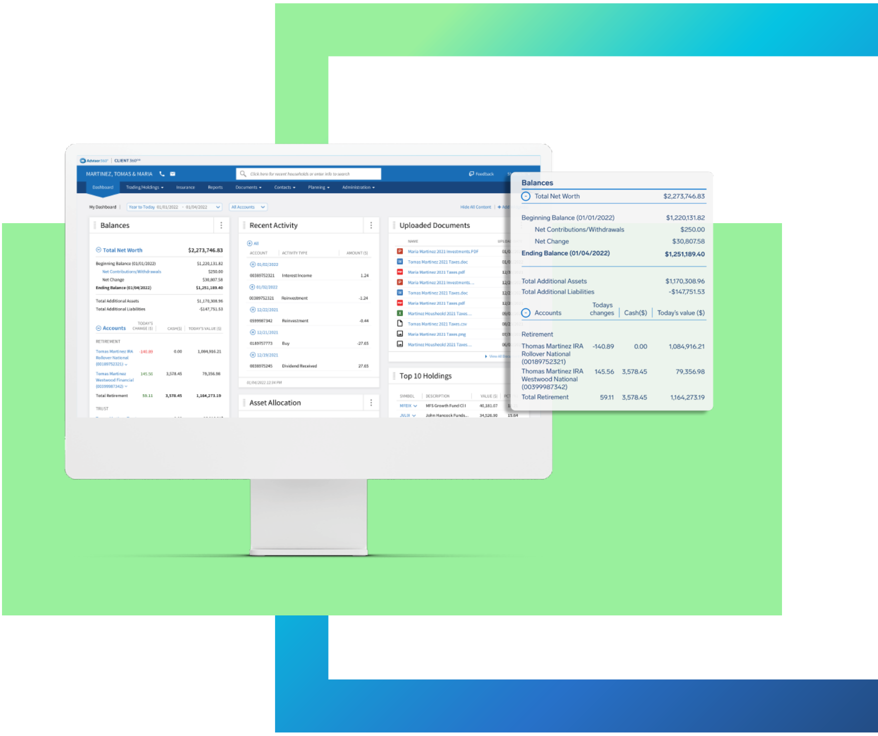
Advisor360° Client Dashboard

- Empowers investors with a secure online portal to view their accounts, review performance, assets, and holdings to help build trust through transparency.

Advisor360° Secure Messaging

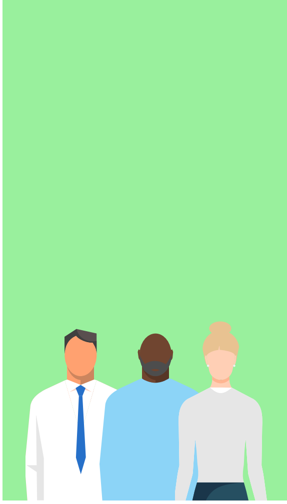
- Allows advisors to communicate and share files with clients with real-time notifications when new messages are received.

Visit www.advisor360.com/platform-overview to learn more about Advisor360°'s wealth management platform.



FMG

Tools and capabilities



FMG tools and capabilities

The only all-in-one marketing technology platform for financial advisors

FMG makes it easy for advisors to market authentically and effectively across every channel, including:

Email →

Mobile →

Social media →

Web →

FMG Email Tools

- Helps provide a smooth onboarding experience through automated sequences set up through the FMG dashboard. Advisors can integrate their CRM with FMG's Email Tools to ensure clients receive relevant communications based on their interests to help keep them informed and engaged.

FMG Mobile App

- Provides advisors with notifications when relevant content becomes available and tools to email it to their clients or share it on social media.

FMG Social Media Tools

- Helps advisors interact with their network and prospective clients. They can also be used to acquire new clients through referrals in their existing network. By leveraging automated social content, AI-powered personalized social captions, Canva integrations to create shareable images, and pre-made campaigns, FMG makes it easier than ever for advisors to build a social media presence and share their expertise.

FMG Web Experience

- Provides advisors with web design, copy, and tools to appeal to their ideal audience. The FMG Web Experience leverages website best practices to create a beautiful, modern website that's easy to manage and helps prospects self-qualify.

To learn more about FMG call (858) 251-2420 or visit www.fmgsuite.com.

Advisor360°

About Advisor360°

Advisor360° builds, integrates, and delivers technology for wealth management firms. The company's award-winning integrated and open architecture SaaS platform brings a connected digital wealth experience to financial advisors, their clients, and the home office so that firms can drive better outcomes and innovate quickly. Advisor360° clients benefit from timesaving capabilities and streamlined workflows when it comes to portfolio and performance reporting, financial planning, insurance, proposal generation, trading and model management, digital onboarding, document management, analytics, and compliance. The company's proprietary Unified Data Fabric™ (UDF) is the foundation of its platform, weaving together shared services and pre-built integrations that work with existing technology stacks. The company is headquartered in Weston, Massachusetts with offices in Bengaluru, India; Belfast, Northern Ireland; and a remote workforce in Canada.

Today, three million households with $1 trillion in assets benefit from the connected Advisor360° experience.

To learn more, visit www.advisor360.com.

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About FMG

FMG powers an all-in-one marketing platform that helps financial advisors and insurance agents attract new leads, stay connected with clients, and grow their businesses. Rated first in market share and customer satisfaction three years in a row by the T3 Software Survey Report, FMG helps its customers develop comprehensive marketing strategies and automate their most effective marketing tactics. FMG is headquartered in San Diego, CA, with satellite offices across the United States.

To learn more, visit www.fmgsuite.com