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# Will Reed's Guerrilla Marketing **GENIUS** *"Wake up your brain, learn how to earn!"*

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July 2005

## Marketing for financial advisors

*When a man  
says money  
can do anything,  
that settles it.  
He hasn't got any.*  
**Edgar W. Howe**



*Read the mind  
behind the numbers*

*Making money is a  
hobby that will  
complement any  
other hobbies you  
have, beautifully*  
**Scott Alexander**

*Consultative "soft selling" is the  
biggest marketing challenge for  
professionals in financial services.*

Whether you are in financial planning, insurance, accounting or investment services, your market is crowded with aggressive competition. Moreover, your clients and customers are overwhelmed with information, and reluctant to risk their money.

If you want people to return your phone calls and read your e-mail messages, learn to speak their language.

*Do you know your client as well as you know money? If not, why should a person invest with you when there are so many other choices available?*

*Get to know two things about a man. How he earns his money and how he spends it. You will then have the clue to his character. You will have a searchlight that shows up the innermost recesses of his soul. You know all you need to know about his standards, his motives, his driving desires, his real religion.—Robert J. McCracken*

### **1. Read minds—not just markets**

Money touches everything, so make it your business to understand how it touches people. Movies, novels, and the daily news are filled with stories about money—what it does to people and how it influences their lives.

Study the branch of psychology that makes the most sense to you, and apply it in your work. Especially learn about the psychology of sales and marketing, as this will have the most direct impact on your business.

### **2. Develop physical presence and poise**

You are as much a part of your service as is your product—and probably a lot easier to understand. If the client cannot put their faith in you, they certainly won't put their faith in your product or advice.

Marketing yourself includes but goes well beyond dressing for success. Wall Street is famous for stress and burnout syndrome. What does your stress level and body language say about you? Keep physically fit. Don't sacrifice your health with fast food and lack of sleep.

*If you want to remain a money player, take up a physical discipline that helps you keep poised under pressure.*

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Comments & suggestions: [info@b-smart.net](mailto:info@b-smart.net)

**His money is  
twice tainted:  
taint yours and  
taint mine**  
Mark Twain



**A wise person  
should have money  
in their head, but  
not in their heart**  
Jonathan Swift



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### 3. Use a marketing plan and calendar

You should be crystal clear in bullet points about the benefits you offer to clients, your target market and ideal client, competitive advantages, marketing strategies, monthly marketing calendar and review, new marketing ideas, sponsorships and community involvement, as well as your marketing budget.

If that sounds like work, it is. Guerrilla Marketing makes the task manageable by giving you a system that is *easy to understand, and actionable on a daily basis.*

### 4. Give away your advice for free

The best way to give your advice for free is through the media. If you can write an article for business publication, be interviewed in a money magazine, or appear as an expert guest on radio or television, you will gain immeasurable credibility as the *obvious expert.*

This is an art and a science, and chances are you did *not* learn it in school. Books in the *Resources* section will give you a blueprint for how to package your expertise and market it to the media.

### 5. Be real—walk your talk

Your clients will trust you more if you demonstrate financial success and balance in your own life. A sickly therapist has trouble gathering clients, and financial services are no different.

Whether you are selling insurance or financial advice, people want to know that you actually *walk your talk.* And you will sound more credible when you speak from experience—rather than just convey information. *Educate yourself as a life planner with financial planning expertise.*

### Resources

*Guerrilla Marketing for Financial Advisors*, by Jay Conrad Levinson and Grant Hicks, shows you how to market professionally and make profits from your Financial Advisory or professional service business. <http://www.financialadvisormarketing.com>

*The Five Rituals of Wealth*, by Tod Barnhart, shows you how to integrate financial planning into a life/work philosophy. Sensible, timeless advice for investors and financial planners alike. <http://www.todbarnhart.com/home.asp>

*Marketing Your Services: For People Who HATE Selling*, by Rick Crandall, Ph.D., is required reading for anyone who is in the business of providing professional services. <http://www.rickcrandall.com>

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