

A Tale of Two Financial Advisors: Communication During Crisis

The COVID-19 pandemic is a disruptive force that requires advisors to change the way they communicate with clients. Advisors who embrace digital marketing are significantly more likely to benefit in market volatility, compared to those who are sticking to traditional methods.



Since the start of the COVID-19 pandemic, investor demand for advisor communication has risen nearly **50%**¹

Here's a tale of two financial advisors: one digitally-enabled, the other reliant solely on traditional methods.

The Digitally-Enabled Advisor

Embraces digital marketing and uses a mix of methods to communicate with clients (e.g., social, email, newsletters).

The Traditional Advisor

Unfamiliar with digital marketing and does not use it in their practice.



+20%
open rate of digital communications over the industry average²



52%
are concerned about losing clients during the pandemic period³



+171%
click through rate over the industry average⁴



37%
are **very** concerned about losing client due to a lack of regular communication



Most Engaging Investor Topics:

- Wellness
- Economy
- Investing
- Business Owner
- Health
- Markets
- Budgeting
- Investor Psychology



Nearly **60%**
struggling to find credible content are concerned about client defection

Where the Opportunity Lies



Nearly **40%**
growth in leads by advisors who embrace digital marketing tools

Advisors who embrace digital marketing have a significantly higher chance of growing their business than those who do not. Fortunately, there are advanced marketing tools that help easily transform a traditional advisor into a digitally-enabled advisor.

Become a **Digitally-Enabled Advisor** today with AdvisorStream's digital marketing platform
www.advisorstream.com/digitaladvisor