



# BUYER'S GUIDE

One simple solution for  
all your marketing needs



FMG Suite is the leading provider of marketing resources for financial advisors. Discover how our handy services, powerful tools, and smart content will help strengthen relationships and build your business.

# We Take the Headache Out of Marketing

As a financial advisor, you have a lot on your plate: running your practice, building your book of business, encouraging referrals, and meeting with your clients. Your time should be spent guiding the financial decisions of your clients, but you also know that marketing your business is crucial for its growth and stability in the long term.

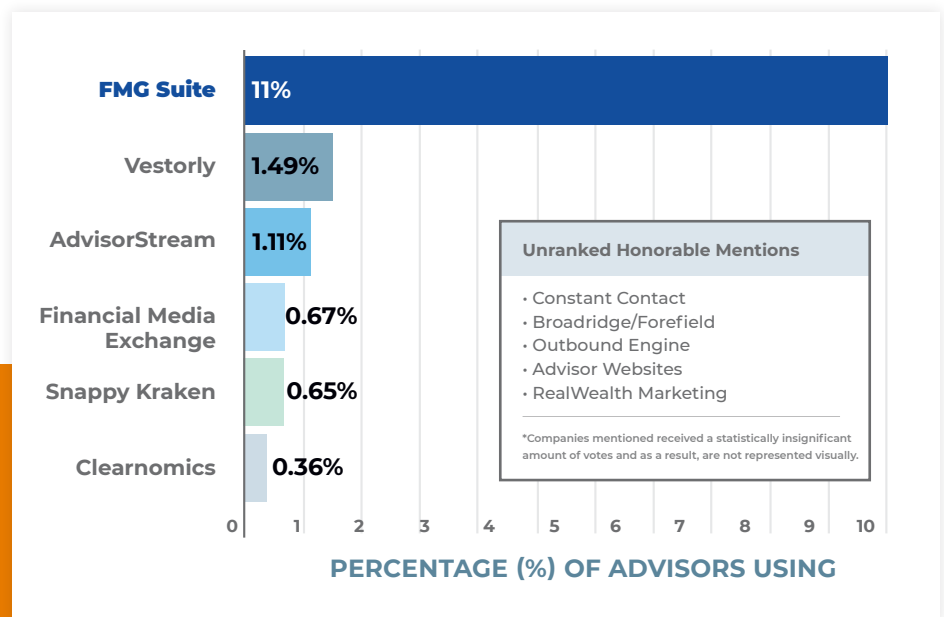
Many advisors are facing the same challenge. They understand the potential of a comprehensive marketing strategy, but they lack the time and resources to execute one.

At FMG Suite, we've helped tens of thousands of advisors develop and launch their digital marketing strategies. With our platform, you can minimize your time spent on marketing activities while building your business. By combining all-in-one technology with compliance-friendly content, FMG Suite makes executing your marketing strategy a seamless process.

**ONE SUITE,  
ONE LOGIN,  
ONE SIMPLE  
SOLUTION  
FOR ALL YOUR  
MARKETING.**

Our tools give you more time to do the things you love—building your business and helping your clients.

**FMG Suite is the number one preferred marketing solution for financial advisors.<sup>1</sup>**





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# CHAPTER 01

## Modern Websites Build Your Presence

You understand that your website is your online representation, an “online business card” that’s broadcasting your brand 24/7. You also know that you can’t afford to make a bad first impression.

An **FMG Suite website** is beautifully and professionally designed, but it’s so much more than just a static page with your name on it. Our websites are mobile-responsive, optimized for search engines, customizable, and powered by a fully integrated marketing hub.

They have the ability to integrate with Google Analytics, Redtail, and Riskalyze, as well as the major social platforms Facebook, LinkedIn, and Twitter, to form the foundation of your marketing stack.

It takes 0.05 seconds for visitors to form an opinion about your website. 94% of first impressions are design related.<sup>2</sup>

We offer three levels of service—**Express**, **Concierge**, and **Exclusive**—for our website setups based on your needs and how quickly you want to get up and running.



“

“I get compliments about my website often. My website actually brought me a \$3 million client. Most advisors in my area don’t have a website and this new client told me that our website was one of the reasons he chose to work with us.”

**Levi Haight**

Senior Wealth Advisor  
Valiant Wealth Management

## CHAPTER 02

# Quality Content Establishes Your Credibility

If our websites are the engine, our more than 400 pieces of original, award-winning content are the fuel. With **FMG Suite's Content Library**, you gain access to videos, articles, presentations, calculators, quizzes, ebooks, and infographics designed to educate and inspire prospects and clients to engage your services.

All our content is produced by knowledgeable industry professionals and is easily integrated with your website, social media, and email campaigns so you never run

**Business owners who use content in their marketing generate three times as many leads and six times as many conversions compared to those who don't utilize content marketing.<sup>3</sup>**

out of materials. Consider using our many automated campaigns to continue engaging clients without lifting a finger.

By regularly sharing relevant, insightful materials at the right time, you can establish yourself as a thought leader in your industry and as a subject matter expert for your clients.

We regularly publish new content on relevant financial topics, including:

- Retirement
- Estate planning
- Investment
- Insurance
- Lifestyle
- Money
- Tax

“The content is fantastic, timely and well-written. Recently, while reviewing retirement plans with a small business owner client, I referred her to my website to try FMG Suite's retirement calculator. She tried it herself and shared the related article with her business partners and reported back that it really helped them pick their plan!”

**Laura LaTourette, CFP®**  
Family Wealth Management Group



# CHAPTER 03

## Compliance-Ready Content Speeds Approvals

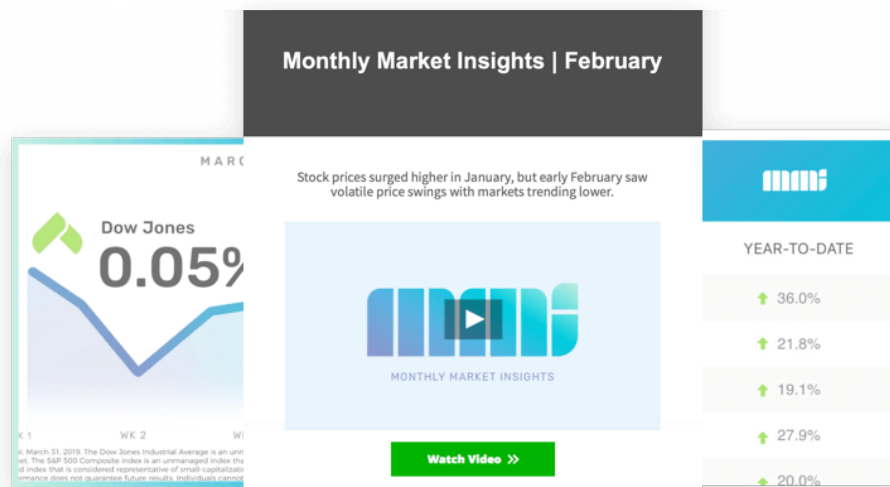
After you prepare your emails, social media, or blog posts to communicate with your clients, our integrated approval workflow helps to expedite compliance approval to get you talking to your clients without delay.

Use the unified dashboard to see the pieces that are in review, need revisions, and have been approved. When you draw from our award-winning, FINRA-reviewed **Content Library**, you can enjoy peace of mind knowing everything you share is written with compliance in mind.

FMG Suite keeps you on your compliance department's good side, and saves you time by automating the whole review and approvals process.



Some advisors say that they spend an aggregate average of one day per week dealing solely with compliance issues. Others say that a significant portion of their expenses are allocated for adequate compliance management.<sup>4</sup>



“The compliance tie-in that the site has is very beneficial. We don’t have to input each piece of content and send to compliance separately. It makes the whole process faster and more efficient.”

**Rick Ray**  
MSFS President and CEO  
Wealth Design Group



# CHAPTER 04

## Automated Campaigns Make Marketing Effortless

Great marketing means engaging the right people at the right time. Our automated marketing campaigns are designed to help you retain current clients while nurturing new prospects.

FMG Suite has done all of the work to build a library of campaigns for you to use in your email and social media marketing efforts. You'll engage and deepen existing relationships with prospects and clients, using campaigns like:

### Monthly Market Insights

Market commentary on last month's market performance and a glance at the month ahead.

### Video of the Month

Informative video simplifying a complex financial topic to establish you as the expert.

The strongest client-advisor relationships form when the adviser connects with clients 12 to 18 times a year.<sup>5</sup>

### Pre-Retiree Primer

Educational series on topics like estate planning, Social Security, and more.

### Happy Birthday

A fun, personalized message containing financial tips for each birthday.

### Holiday

Sent six times a year, a timely holiday greeting that helps you stay in touch.

### Referral Campaign

Drive new business by inviting clients to refer their friends and colleagues.



My favorite part of FMG Suite? Definitely the email campaigns because they make it easy to communicate effectively with so many clients and prospects at the push of a button. Also, page gating has helped us acquire so much valuable information on prospects...very useful for marketing."

### Elise Kensinger

Director of Digital Marketing  
White Rhino Financial



# CHAPTER 05

## Social Posts Engage Prospects & Clients

To be effective on social media, you need to have a consistent, visible presence. To authentically grow your following and establish yourself as a credible thought leader in your industry, it's vital that you are consistently sharing valuable, engaging content.

Our **social media tools** help you establish a foundational presence on LinkedIn, Facebook, and Twitter with automated, compliance-approved social posts.

79% of advisors acquire new clients through social media, with an average annual asset gain of \$5.6 million from these clients.<sup>6</sup>

Customize the frequency of your posts, and choose the type of content you'll post to match your audience's interests. Or take your social media marketing to the next level with custom-created posts scheduled for just the right time using our **Social Scheduler**.



All posts and social sequences drive traffic back to your website where your followers can learn more about you and your business.

“Within two months of setting up my website and social media through FMG Suite, I got some leads from Facebook that led to \$1.7 million under management. Younger clients are all over social media, so I hope my presence on these platforms will lead more of them to reach out.”

**William Bryan**  
LPL Financial Advisor  
WHB Financial



# CHAPTER 06

## Lead Generation Tools Grow Your Business

Your website is more than a digital business card. It serves as an interactive hub that can turn visitors into leads and prospects automatically. The best way to encourage visitors to connect with you is through forms that gather their contact information.

We make it easy to add multiple capture points, turning your website into a lead capturing machine.

63% of marketers say generating traffic and leads is their top challenge.<sup>7</sup>

### Contact forms

Encourage visitors browsing your site to submit contact information.

### Newsletter signup form

Make it easy for visitors to join your email list.

### Event manager

Publicize upcoming events and easily capture RSVPs online.

### Lead capture

Offer educational ebooks and other materials for visitors to download.

### Quizzes

Encourage people to stay on your website longer with financial quizzes.

“Thanks to FMG Suite, I’ve received new business. In the past year, we’ve experienced about a dozen different benefits, whether it’s new accounts, new clients, or an increase in our assets under management.”

**David Richardson**

Co-Founder

Richardson Financial



# CHAPTER 07

## Accurate Analytics Inform Your Insights & Decisions

It's been said that you can't improve what you don't measure. Since marketing is an experimental exercise, it's essential to review your results from time to time, determine what's working, and what adjustments you need to make.

With our Google Analytics integration, you can monitor where your traffic is coming from and which website pages are performing best.

88% of marketers use data obtained from third parties to enhance their understanding of each customer.<sup>8</sup>

Our **Automated Campaigns** tool tracks the posts you're sharing on social media. You can also watch the performance of your email campaigns, including deliverability, open rates and click-through rates.

These data insights let you keep your finger on the pulse of your marketing efforts.



“I like that my website integrates with Google Analytics and that I can view the metrics of our email and social media campaigns. It's really helpful to see the traffic to our website and social media pages and to see who is interacting with our marketing.”

**Steven Perry**

Financial Advisor

Preheim & Perry Financial Group



# CHAPTER 08

## Personal Coaching Elevates Your Marketing

Launching a website and developing your marketing strategy takes a lot of work. The value of having a knowledgeable guide in the process? Priceless.

As part of the **Elevate™** package, FMG Suite provides a marketing specialist who will get to know you, your goals, and how you do business. They'll help you create a 12-month marketing plan that's custom for you, including a proven mix of tactics, tools, and services selected with your unique needs in mind.

With an FMG Suite coach to call on, it's easier than ever to keep your digital presence fresh.



Those who rely on training see a 22% increase in success. Those who add coaching see up to 88% increase in success.<sup>9</sup>

Your marketing specialist will provide strategic guidance on:

- Website design & setup
- Branding development
- SEO/SEM & paid advertising
- Content strategy
- Lead generation
- Planning & analysis

As an advisor, you understand better than anyone that having an expert in your corner is a good idea. With an FMG Suite marketing specialist you can take your marketing to the next level.



“Working with FMG Suite has been a wonderful process overall, especially working with my Marketing Coach. She was extremely patient and helpful and when we ran into issues... she was able to help clarify the things I needed to do.”

**Andre Marshall,**  
President & Owner  
AGM Financial

# CHAPTER 09

## Custom Website Copy Sets You Apart

Great content sets your website apart from the competition, and sharing the right message will resonate with clients and prospects.

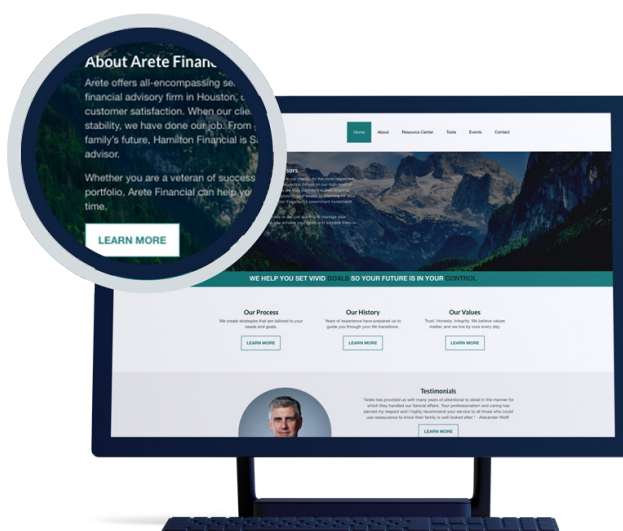
Through FMG Suite's **Copywriting service**, you'll work with a professional copywriter to create personalized web copy that shares your business philosophy, distills your niche, and identifies what makes you unique.

We write with search engine optimization (SEO) in mind, and we help you through the entire process, including compliance submission.



45% of a brand's image can be attributed to what it says and how it says it.<sup>10</sup>

FMG Suite professional copywriters provide a range of writing services, including website content, leadership team biographies, custom blog articles, email newsletters, direct mail pieces, and more.



“The Copywriting service was a great value to my company because it helped me concisely articulate my niche market and value proposition to website visitors—a task that would have taken me forever to accomplish without help.”

Ryan Carrus, CFP®, CDFATM

Founder

Carrus Financial Management

# CHAPTER 10

## Professional SEO Makes Your Firm Easy to Find

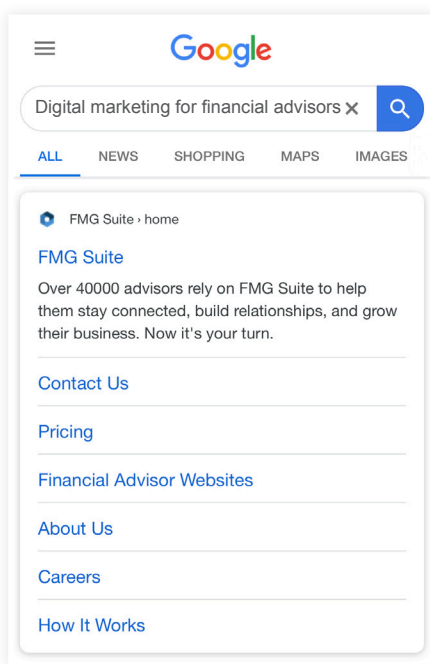
When it comes to being discovered online, how you optimize your website to be found on search engines makes all the difference.

Organic search results are those driven by your content, Search Engine Optimization (SEO), and other marketing efforts without the use of paid ads. While search engines rank organic search results based on hundreds of factors, organic traffic is typically seen as the most relevant, authoritative, and trustworthy.

95% of traffic goes to sites that appear on the first page of search results.<sup>11</sup>

FMG Suite's **SEO Foundations** program helps to increase your online visibility through a combination of the following:

- Keyword analysis
- Content audit
- Social audit
- Competitor profile
- On-site optimization



“Since launching my website with FMG Suite, I’ve already seen increased traffic because of the simple design and easy navigation. Our old site was so cluttered that no one ever visited it. Now, I hear my clients and prospects rave about the ease of using my new site.”

**Bill Kenoyer**

Investment Representative  
Kenoyer Financial

# CHAPTER 11

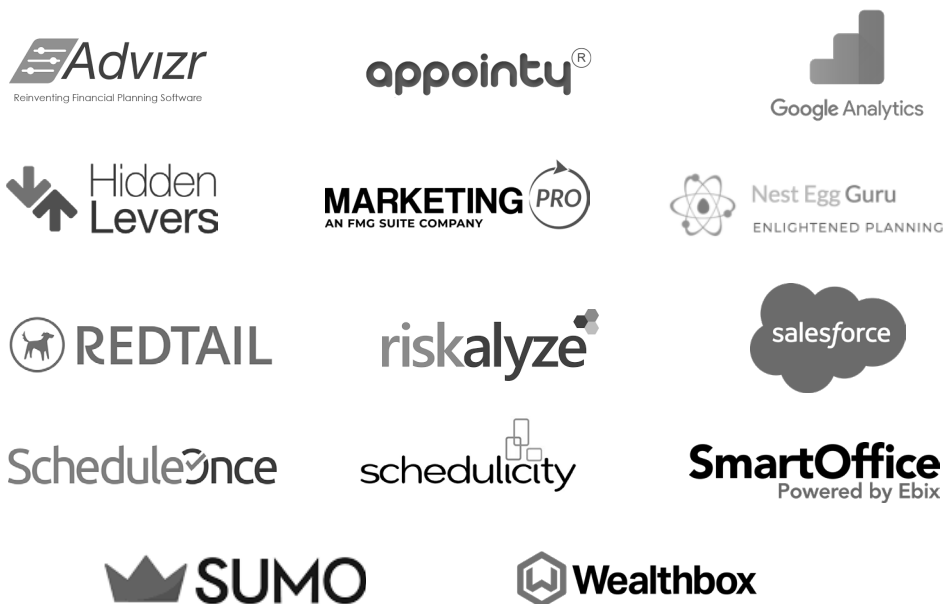
## All-in-One Platforms Simplify Adoption

One of the challenges of managing your business operation is making sure your different technology solutions work together. FMG Suite offers you an all-in-one solution that's accessed from a single, web-based dashboard. With just one simple FMG Suite login, you can access all your marketing tools, making it super easy to check in on how things are going anytime you want.

FMG Suite seamlessly integrates with other tools and applications to streamline your operations.

80% of marketing executives introduce 1-5 new marketing solutions a year.<sup>12</sup>

Our array of integrations include the following:



“FMG Suite has really streamlined our marketing process so we can spend more of our time having one-on-one client meetings, NOT spending time on minutia. If you're looking for an all-in-one marketing system, you won't find a better system than FMG Suite.”



**Devin Garofalo**

Founder & President

Colonial River Wealth Management



# CHAPTER 12

## Great Customer Service Gives You Confidence

FMG Suite delivers high-touch customer service. From website setup, to strategy execution, to marketing upkeep, we're in your corner and providing all you need to succeed. We're committed to helping you get results. Here are some of the customer service perks you'll receive:

### Custom Website Setup

We offer three levels of setup suited to your business needs.

### White Glove Domain Transfer

We transfer all your content from your existing domain.

### Access Marketing Coaches

Learn how to develop your 12-month marketing plan with the guidance of a marketing specialist.

### Six-month Checkup

We schedule a checkup six months in to make sure you're getting the most out of FMG Suite.

### Two-year Refresh

We keep your website looking fresh with an updated homepage design every two years.

### Unlimited Phone and Email Support

Contact our support team via phone, chat, and email; we don't stop until you're satisfied.

### Regular Webinars

Webinars provide extra training for advisors on how to use FMG Suite to achieve their marketing goals.

For more complicated interactions, 40% of customers prefer talking to a real person over the phone.<sup>13</sup>



"I joined FMG Suite because of the automation, the content and the quality of the service staff. Every time I call with a question, they never hang up the phone until they are satisfied that I am satisfied with the answer. It's a great relationship I have had with FMG Suite for many years!"

**Jose "Rafi" Rodriguez**

President, RICP®

Retirement Lifestyle Solutions



# LET'S BUILD YOUR BUSINESS TOGETHER

Over the last decade we designed the ultimate solution for financial advisors looking to build strong relationships by upgrading their marketing. Today, we are the #1 preferred software according to the 2019 T3 Survey.

Our team is made up of writers, designers, marketers, compliance gurus, and marketing experts who share a common goal: to help you become an extraordinary marketer. Everything we do and create is designed to help you accomplish your

goals and build the business you've always wanted.

We believe advisors deserve to focus on what they love. They love helping their clients. We love marketing. We combine intelligent technology with award-winning content, bringing

great results to over 40,000 financial professionals every day.

If you're ready to see these tools in action, we'd love to show you around.

— The FMG Suite Team

Request a live demo of FMG Suite today by calling (858) 252-1271 or visiting us online at: [fmgsuite.com/get-a-demo](https://fmgsuite.com/get-a-demo)

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