The Client Journey Has Changed

Leveraging AI and Digital Shifts to Optimize Advisor Marketing

NBC | SECURITIES | MBC strategic

Your Next Client Is Already Evaluating You

Prospects don't wait for a referral call or a first meeting. They search, assess, and form opinions before you know they exist.

Prospective clients are now evaluating you based on

what they *find,* not what you *say.*

Most Advisors Are Missing
The Shift

The gap between advisors who've adapted and those who haven't is widening — and it has nothing to do with the quality of advice.

Discoverability

Prospects can't find you through search or AI engines

Credibility

No visible expertise means no perceived authority

Top-of-funnel Volume

Fewer prospects entering your pipeline organically

Your advantage only exists if your expertise is clearly showcased online.

Strategy Outperforms Effort Every Time

Advisors with an organized, defined marketing strategy generate **168%** more qualified leads than those without one.

- Hinge Research Institute

ADVISORS WHO ADAPT TO THE NEW PARADIGM WILL OWN THEIR MARKET.

Client Journey

"How does someone decide to trust you before they've met you?"

Digital Is The *New First Touchpoint*

The first meeting used to happen in your office.

Now it happens on

Google

LinkedIn

Claude

perplexity

ChatGPT

Credibility Is Built Before You Ever Speak

Discovery starts with search queries and third-party sources.

Prospects expect concise, useful content that answers their specific questions.

Trust signals span websites, bios, thought leadership, reviews, and social presence.

71%

of investors research financial professionals online before initiating contact.

-Broadridge Financial Solutions

Your Marketing Funnel Has A New Top

The Modern Prospect Journey

New Top

Digital credibility check
Search – LinkedIn – Website – Reviews – Social proof

Passes filter

Classic Funnel

Awareness
Search – Social – Referral

Consideration
Content evaluation – Profile review

Interest
Targeted outreach - Engagement

Conversion
Meeting – Proposal – Onboarding

Retention
Ongoing comms – Reviews – Referrals

Client

How To Optimize The Top Of The Funnel

01

Assess your presence

Audit every place a prospect can find you — Website, LinkedIn, Google Business Profile

02

Upgrade your discoverability

Sharpen bios and advisor pages with specific value messaging tied to your target client

03

Answer investor Q's upfront

Add 3–5 FAQs to your web pages that mirror how prospects actually search

04

Build visible branded expertise

Publish NBCS and ISS insights as short, searchable content briefs

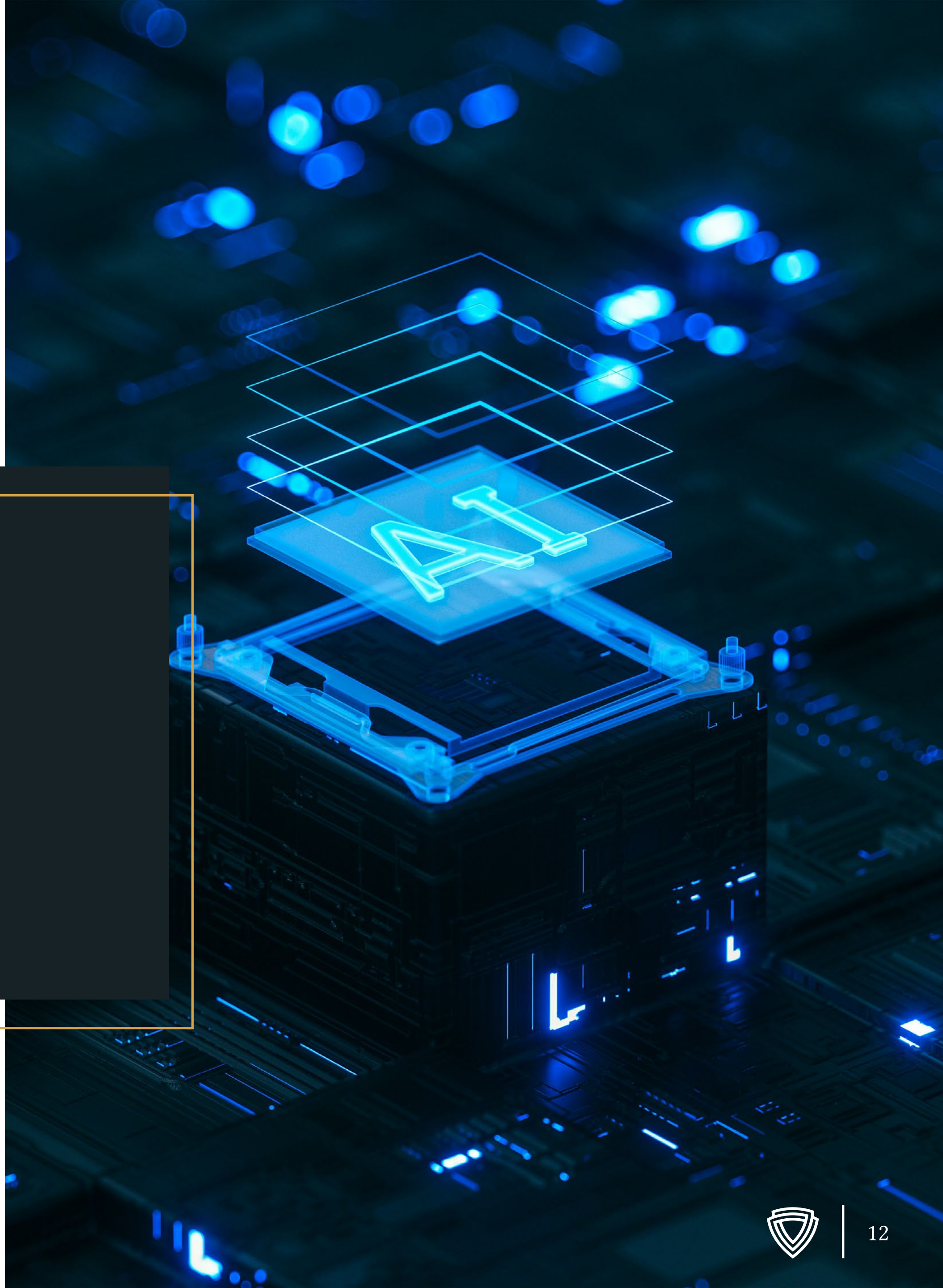
The New Rules of Visibility

“Most advisors were built for Google search. AI search plays by different rules.”

AI Search Is The New Digital Gatekeeper

Prospects are getting answers directly from AI engines.

If you're not surfacing as the authority, someone else is.



More Visibility=More Clicks

91%

of educational financial queries
now trigger a Google AI Overview

-BrightEdge, 2025

35%

more organic clicks for firms cited
in AI Overviews

-Seer Interactive 2026

Discovery Starts With *Being Deliberate*

AI engines don't scroll and click. They programmatically scan your content for clear, direct answers to specific questions — and cite the sources that make it easiest.

Clarity Beats Volume

Long, keyword-heavy content ranked well before. AI engines reward short, direct answers to specific questions.

Structure Over Style

Unstructured content gets skipped. Clear topic pages, direct insights, and structured FAQs tell AI what you're known for.

Authority From Association

Rankings built credibility before. Today, linking to NBCS research and ISS commentary is what signals trust to AI engines

How To Win AI Search

1. Organize Content Around Your Expertise

Cluster by theme — markets, taxes, retirement — so AI knows what you're known for

Core Entities

2. Publish in AI-readable Formats

Short insights, carousels, FAQs, and quick explainers; structure and clarity determine if AI surfaces you

Semantic Extraction

3. Strengthen Your Authority Signals

Link to NBCS articles, ISS commentary, and leadership perspectives to build credibility

Domain Authority

The Advisor Playbook

“So what actually moves the needle?”

Those Who Show Up, Stand Out

Advisors gaining ground win through sharper positioning and consistent execution

Small, focused, and repeatable moves compound over time.

Digital Experience Is The New Baseline

Modern clients expect a seamless digital experience, anchored by human interaction.

Friction they used to tolerate now signals something is wrong

USED TO TOLERATE		THEY NOW EXPECT
Response lag times	→	Proactive outreach that shows up before they worry
One-size-fits-all correspondence	→	Content that speaks to their situation more specifically
Clunky digital experiences	→	A digital presence that answers questions before they ask

How to Close the Gap & Take the Lead

Show up the way clients already expect

Turn client experience into a consistent marketing system

Personalize at scale

Segment your clients into 3–5 profiles and deliver messaging that speaks to their specific situation.

Distribute Consistently

Deploy NBCS and ISS content across email and social on a defined schedule — show up regularly with a point of view.

Automate your presence

Pre-schedule touchpoints in your CRM so client communication runs between conversations.

Emphasize your independence

Wirehouses can't say what you can. Your independence is a differentiator — make it visible.

Fix These One, Benefit Indefinitely

01

Rewrite

your bio and website around your target client's situation and problem

02

Reframe

your LinkedIn headline around the problem you solve for your target client

03

Claim and optimize

your Google Business Profile

04

Set up

your NBCS outreach cadence in your CRM and let it run

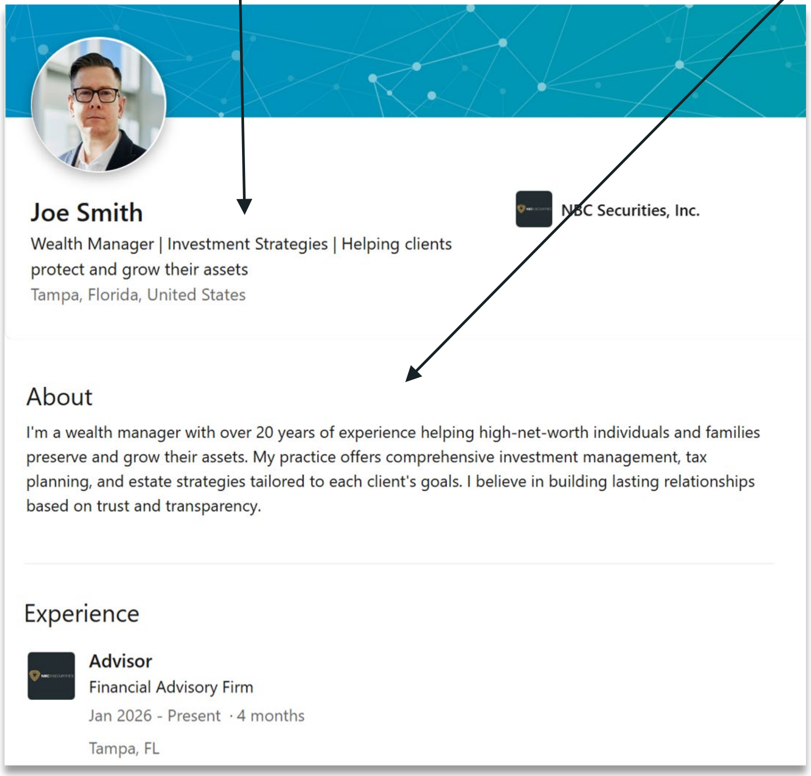
Optimize Your LinkedIn Profile

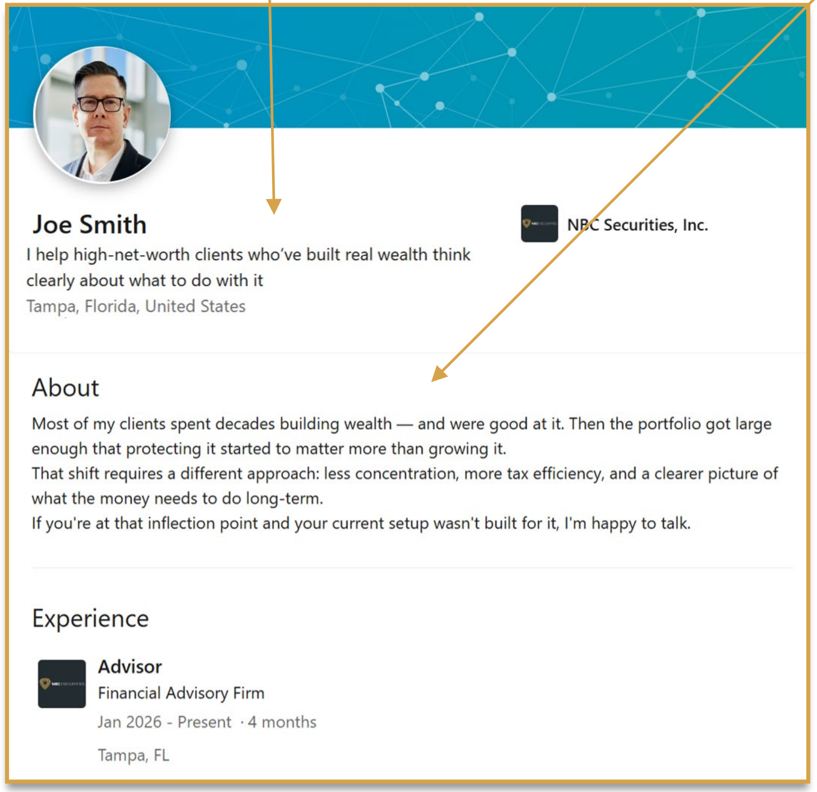
Generic and service-forward.
"Protect and grow" is what every advisor says — signals nothing about who this is for

Advisor-centric.
"Trust and transparency" is filler. Nothing speaks to a specific moment the client is living through.

Names the client, the moment, and the job. No filler. The right person reads this and feels seen.

Opens with the client's lived experience. Names the inflection point. CTA is framed around fit, not a sales call.





Update Your Google Business Profile

Before (unoptimized)

Wealth Management Firm

Financial Planner

★★★★★ 30 Google reviews

Website | Call

Address: Wealth Management Way, Money City

Hours: 9am – 5pm

Full-service wealth management firm offering investment and retirement planning.

Reviews

Review | Photo

"Great firm"

"Nice office and people"

Generic reviews and no location or niche signals

→

After (optimized for intent + credibility)

Wealth Management Firm

Wealth Management for Business Owners

★★★★★ 30 Google reviews

Website | Call

Address: Wealth Management Way, Money City

Hours: 9am – 5pm

Advisory firm specializing in liquidity planning, tax strategy, and portfolio construction for entrepreneurs and executives in [City]

Reviews

Review | Photo

"Helped me navigate a $12M business sale and reduce tax burden"

"Guided equity diversification strategy post-IPO"

Reviews reference specific outcomes

Choose A Topic And Own It

One topic you own.
One insight per week.
One unified voice across every channel.

Publish a short article or video in clear, simple terms that demonstrates your perspective and expertise.

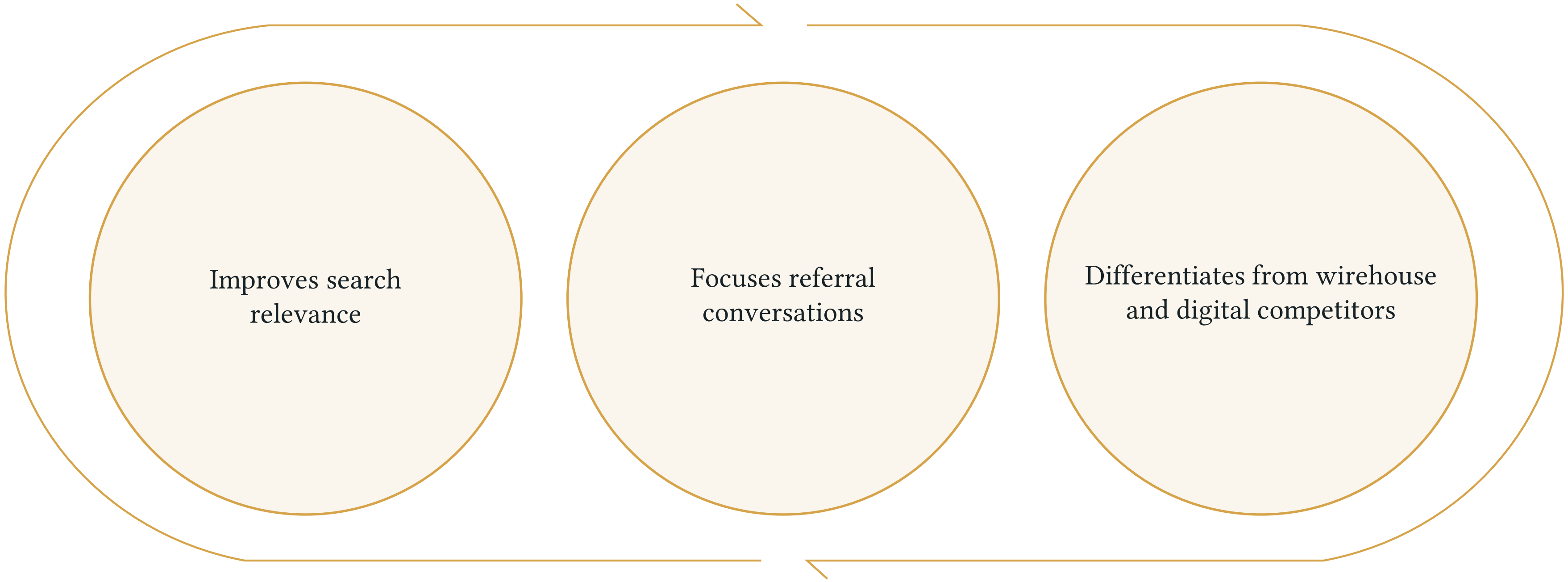
Where to Start

Take NBCS or ISS content and add a few sentences connecting it to your clients

Consistency Is The Competitive Advantage

6 months of consistent publishing creates a searchable body of expertise

A DEFINED POSITION



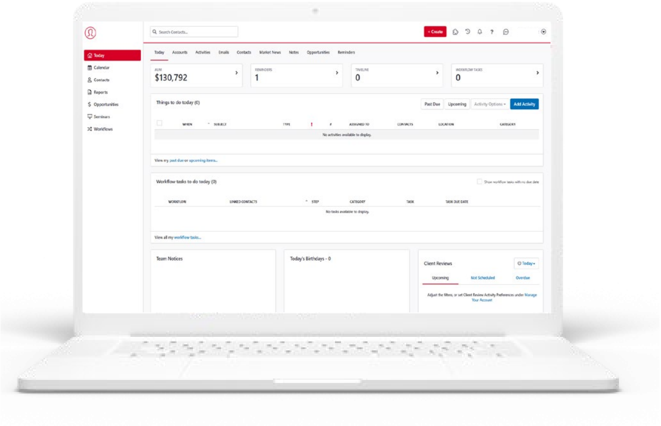
You Already Have The Infrastructure To Do This

Ready-to-Use Templates and Insights

Designed NBCS content you can deploy rapidly across social, email, and website

Commentary and Leadership Perspectives

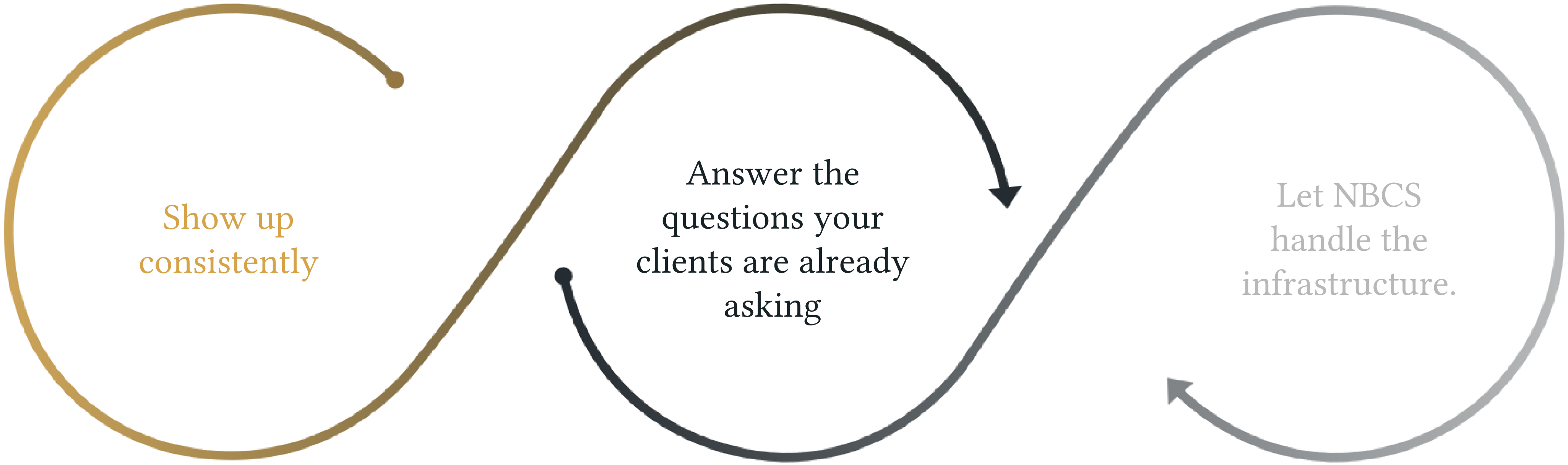
Expert market commentary and ISS that position you as the informed voice in your clients' digital experience



CRM-Integrated Touchpoints

Pre-built outreach workflows that plug directly into your existing system

The Strategy Is Simpler Than You Think



What’s your one move this month?

Identify your strengths.
Differentiate your firm.
Communicate your edge.