

## A Marketing Guide for RIAs: Part 5 – Become an Expert

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*This is part five of a ten part series on marketing an RIA. Read [A Marketing Guide for RIAs](#) for a full overview. To view the installments in this series, select “RIA Marketing Guide” in the left margin.*



Many advisors I speak with express interest in presenting to local associations or writing a financial column for a local newspaper. Public speaking and newspaper columns can be effective ways to prospect for clients. That being said, there are dozens if not hundreds, of other advisors in the same geographic region trying to achieve this same goal.

In order to garner the attention of the media and local associations, you need one of three things: money, an inside connection or a unique offering (i.e., expertise). A unique offering is the most valuable asset since it allows you to create a demand for your expertise that can be translated across a variety of events and media sources.

Creating an expertise within your field is fairly simple and something you have probably already achieved. You have to educate yourself about the issues affecting your niche market and understand the solutions to solving those problems.

Creating awareness of your expertise can be more challenging. In the past, you would have to write a book, host dozens of seminars, hire a PR agency, or host a radio show to gain exposure for your expertise. Luckily, technology has made this process simpler and less expensive.

Below are the four steps you need to begin being recognized as an expert in your field:

### **Step 1: Define your expertise**

To become an expert, start by clearly identifying your expertise. The expertise should be directly related to the niche market you identified in the [Pick a Niche](#) exercise. Fill in your expertise in the box below.



*Example: Financial Planning Issues for Blended Families*

Expertise

## Step 2: Choose topics

To create awareness of your expertise, you will need to create content on a regular basis. This will require you to identify a variety of topics surrounding your expertise that avoid repetition but continually reinforce your expertise.

Use the box below to identify five to ten potential topics. Feel free to be flexible in the topics you choose and include subjects that might be outside of your services but still generally relate to money. Review the Current Situation, Unique Issues/Needs and Solutions you identified for your niche market in the [Craft Your Message](#) exercise to help brainstorm ideas.

*Example: Blended families*

- *Estate planning pitfalls for blended families*
- *College planning tips for your children and step-children*
- *How to teach your children about money when your ex is a spendthrift*

Topics

## Step 3: Create content

Once you have identified your topics, the next step is to create the content that will highlight your expertise. Choose which media you will use from the list below. Be realistic about your abilities. If you are a stronger public speaker than writer, choose podcasts, video blogs, seminars or webinars. Be realistic about your time. Choose one medium first and then add additional media after you have mastered the first.

Use the topics you listed above for your initial subjects. As you begin developing your content, new ideas will come to you.

- Blogs
- Podcasts
- Videos/Video Blogs
- Newsletters
- Seminars
- Webinars
- Books
- eBooks



- Radio Show
- Presentations
- Advertorials (Paid Articles in Publications)

**Step 4: Promote content**

In steps one through three, you created your expertise. Now it is time to increase awareness of your expertise. To achieve this, distribute your content using a variety of methods. Combine methods to reach both your existing contacts and a new audience. Choose from the list below how you will promote your content.

[X]	Item	Notes
<input type="checkbox"/>	Website (Required!)	<ul style="list-style-type: none"> <li>• Make all of your content accessible through your website since this is the first place people will look when researching your business.</li> <li>• If hosting webinars or seminars, include an “Upcoming Events” page promoting the events and encouraging registration.</li> <li>• If you are interested in speaking engagements, including a “Speaking” page listing topics you can address including description, length and contact information.</li> </ul>
<input type="checkbox"/>	Social Networking Sites	<ul style="list-style-type: none"> <li>• Post your content on LinkedIn, Facebook and Twitter to increase exposure. Utilize groups that are specific to your niche market.</li> <li>• Find specialized social networking sites such as those on <a href="http://Ning.com">Ning.com</a> to promote your content to your niche market.</li> </ul>
<input type="checkbox"/>	Email Marketing	<ul style="list-style-type: none"> <li>• Send out regular emails to your current network with links to your content. This will help spread the word about your expertise. Add centers of influence to your list who can help get your expertise in front of the right audiences.</li> </ul>



[ ]	Other Websites & Blogs	<ul style="list-style-type: none"><li>• Find other websites and blogs that cater to your niche market and make comments on stories that relate to your expertise. You will be able to include a link to your website or blog along with your comment which will drive traffic to your own content.</li></ul>
[ ]	Direct Mail	<ul style="list-style-type: none"><li>• If you are hosting a workshop or providing something free of charge (e.g. copy of a book), you may choose to use direct mail to increase awareness.</li><li>• Only use direct mail if you have a clear call to action which you can measure.</li></ul>

Creating a perception of expertise will take time. If you focus on the issues of your niche market, create content addressing these issues and promote the content to your niche market, centers of influence and your existing network, you will begin creating a name for yourself as an expert in your field.

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