

The Newsletter of FPA of Greater Kansas City

News & Views

August 2023



FPA

**FINANCIAL
PLANNING
ASSOCIATION**

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KANSAS CITY**

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CAREER LISTINGS

Visit the FPA of Greater Kansas City [Careers Page](#) for a full list of available positions.

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THE POWER OF AUTHENTICITY IN ADVISOR MARKETING EFFORTS

Ever done a trust fall with a friend before? Having your back turned and letting yourself fall back into the arms of a friend tests how much we believe the person will catch us. This exercise is hard enough with someone we know. Now, imagine doing it with a total stranger. This would entail a new level of risk because we may not know how authentic or trustworthy this individual is.

Relying on a stranger in a trust fall is similar to someone signing on with a new financial advisor and trusting them to take care of their financial life. Prospective clients want to know that an advisor is authentic and trustworthy before giving them their business. Creating and sharing authentic content and displaying that throughout your online presence and marketing materials is one of the best ways to build trust and credibility.

Every business in every industry wants to be seen as authentic, and many restaurants have this same goal. A restaurant in my hometown of Kansas City that I had the pleasure of eating at recently built their entrance in the back of the building to allow patrons to enter through the kitchen. There is a long hallway that leads through the kitchen, with windows that line the sides, so the public can observe what really goes on behind the scenes. Customers are able to see how the food is made and how the kitchen is run. They know what they are paying for because they can literally see it with their own eyes. They also see who they are paying.

Putting every aspect of an advisory firm on display like this is not an option. Private and sensitive information needs to be protected. How, then, can you metaphorically open your backdoors to the public? How can you allow clients and prospects to see that you are truly authentic? This all comes down to adapting content marketing to showcase company characteristics and values. Lifting the curtain to show behind the scenes into the character and culture of the firm, and the people at the firm, can have significant benefits.

Content Marketing

Content marketing can be broken down into what we call the “Four C’s”: Canned, Curated, Custom, and Credibility. While all four allow you to show the character and values of you and your firm based on what you create or curate, for authenticity purposes, it’s most important to focus on the last two: Custom and Credibility. While these are the hardest and most time consuming to create, they provide the most value in your marketing efforts.

Custom content is unique content that you create, including blog posts, bylined articles, videos, podcasts, special reports, guides, white papers, checklists, and more. Credibility content, also known as Celebrity content, is third-party content that positions you as an expert or thought leader: having a bylined article published or being quoted or profiled in prominent industry, national, or local publications, winning an award from an industry or local organization, etc. Both Custom and Credibility content allow you to be authentic in the content you create while also positioning you as an expert – the perfect blend of authenticity and credibility.



While the financial services industry used to be all about credibility, what consumers are looking for has shifted a bit: they now want a credible expert that can also be an authentic, personable human being – someone they can connect with and trust on both a professional and personal level. Authenticity is now equally – if not more – important as credibility.

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Blogs

Blogs on your website provide a unique channel to display both credibility and authenticity. Advisory firms can use a blog to demonstrate knowledge, expertise, and thought leadership, but also character and values. Your blog posts should not be advertisements or sales pitches. Instead, create educational content and take the opportunity to provide unbiased help and advice on certain topics that are valuable to your audience.

Avoid posting ways that your business helps people achieve their financial dreams. Instead, explain what they can do on their own, or break down a complex financial concept that may be difficult to understand otherwise. Teach effective budgeting and spending habits. Think of topics that people would see great value in and focus your writing on that. Your audience will appreciate those ideas and will form a deeper level of trust if you provide free advice and value-added content, rather than constantly trying to sell your services. Plus, the ability to position yourself as an expert on these complex financial concepts may help them realize that they can't do everything on their own and need a trusted partner.

Videos

Creating videos is another great way to be authentic with your audience. Many companies across all types of industries have had great success posting personable videos on their website, social media pages, and YouTube channels. From holiday greetings, to "Meet the Team" videos, to behind the scenes videos and office tours, to educational vlogs and webinars, your audience will enjoy watching and getting to know you and your team. What better way to build trust and connection than by giving your audience a literal face and voice. Videos gives prospects the feeling that they already know you and the type of person you are before they even have a chance to meet you.

Social Media

An incredibly effective method to display authenticity is through social media. It is no secret that social media is a great channel to reach and grow your audience, however, a very common issue that we find

with advisory firms is that the content they post becomes too much of an advertisement. You can't expect to be seen as authentic if you are constantly trying to sell your audience. Content posted on social media should be either:



1. Value-added content: some kind of educational resource that provides value to your audience on a relevant topic (educational blog post, white paper, checklist, video, podcast, etc.).
2. Credibility content like a media mention, award, or profile that lifts the profile of the firm, bolsters credibility, and provides a "wow" factor.
3. Authenticity content that lifts the curtain and shows behind the scenes into the character and culture of the firm: team photos at holiday parties or team building events, photos of team members on vacation, with their families or pets, volunteering in the community, at a conference, supporting a local team or organization, etc.
4. Content that is relatable or triggers some type of emotion from your audience: pride, purpose, security, relief, joy, thrill, curiosity, concern, fomo, etc.

Take a look at [Bogart Wealth's LinkedIn](#) page. The content that they post doesn't advertise products and services. Instead, you'll see lots of custom and credibility content: value-added content like blog posts, videos, and special guides, as well as media hits, awards, and profiles in local, national, and industry outlets. Scroll down a bit further and you'll see team photos from office and holiday parties, ugly sweater competitions, conferences and community events, celebratory posts when a team member has a birthday, work anniversary, or passes the CFP® exam... then take a look at the type of engagement they're getting on their posts, the number of likes and the number of followers on their page. These numbers

are much higher than most advisory firms because 1. They are producing lots of great content across all Four C's of content marketing, and 2. They are sharing lots of authenticity content that shows the character and culture of the firm and the individuals at the firm. This not only builds trust, relatability, and connection among clients and prospects, but also camaraderie and pride among team members.

The same approach is taken on [Blue Chip Partners' LinkedIn page](#).

This level of trust and feeling of connectivity can't be bought. This type of content showcases specific values – many of which are shared by the firms' target audiences and ideal clientele. Prospective clients really start to relate to and understand the type of people they'll be working with. If your firm passes the credibility test, authenticity can be the final push that prospects need to feel comfortable signing on to work with you and can be a huge factor in growing your business.

Website Bio Pages

Another great place to be authentic is in your firm's website bios. I'll point to [Blue Chip Partners](#) again as a firm that has done a great job with team members' bio pages. In addition to their standard bios with background, experience, roles and responsibilities, scroll down a bit further on each bio page to see colorful answers to fun questions like "What was your first job?", "What's your favorite holiday?", "What TV game show would you want to go on?", "If you could have one super-human ability, what would it be?", and more. There are also very endearing questions such as "What is the greatest lesson you learned from a client?"

Most team members also have a personal "Get to Know Me" video, where each team member shares their story and discusses their career path, their personal interests, and their motivations and driving factors for getting into the business. These videos are an incredible tool for showing authenticity and building trust and connectivity.

Another great example is the team page on our very own website, [Impact Communications](#). At the end of our bio pages, you'll see a few photos of that team member – not only at industry events or with the

team, but out in their community, spending time with family, traveling, or doing something they love.

Bio pages like these allow you to display both the professional and personal sides of yourself and help your audience feel like they know you on a more personal level. Prospects have a unique opportunity to "meet" team members without even having to step foot in the door of the building.

Becoming More Authentic

Building authenticity and personality into your marketing efforts takes time, and the approaches to how an organization utilizes content marketing can vary. The important thing to remember is to always make sure that you have your ideal client in mind. Put yourself in their shoes. If you had to trust someone with your entire financial life, wouldn't you like to get to know them on a more personal basis? Wouldn't you like to trust them enough to fall back into their arms?

It would be great to be like the patrons who enter through the kitchen of a restaurant and see behind the scenes. Lifting the veil and giving clients and prospects that behind-the-scenes look into the character and culture of you and your firm can build a level of trust and connection that is invaluable, and ultimately leads to a high level of prospect conversion and client retention. By focusing your marketing efforts on being more authentic, over time, you will enjoy deeper relationships and the loyalty that comes from clients that trust you and know you on a more personal level.



Jonny Swift
Vice President
Impact Communications

Jonny Swift is Vice President and Director of Social/Digital Strategy at Impact Communications (www.ImpactCommunications.org), a full-service marketing and PR firm based in Kansas City, serving independent financial advisors and allied institutions.

2023 FPAGKC SYMPOSIUM

17 Hours of CE Available



29 August 2023
07:15 AM to 05:00PM

Embassy Suites Conference Center
10401 S Ridgeview Rd
Olathe, KS 66061

BREAKOUTS AND DISCUSSIONS

SUPER CE SESSION-13 HOURS CE

ADVANCED PLANNING PATH

- 199A Deduction Planning
- Gifting Strategies & Discussion Skills
- Advanced Life Insurance Planning

CORE PLANNING PATH

- Medicare and Senior Needs Planning
- Tax Diversification in Retirement
- Estate Planning Opportunities and Strategies
- Super CE Available 7:15-8:15AM

INVESTMENT IDEAS AND PRACTICE MANAGEMENT

- First Trust Economist Bob Stein
- Asset Class Expectations
- Dividend Strategies
- Big Ideas for 2023
- Factors vs Fundamentals
- "Brand Your Plan" with Carson Coaching

KEYNOTE SPEAKERS

Thomas Hoenig
Retired Chair of KC
Federal Reserve
Board



Jeff Levine
Lead Financial
Planning Nerd
kitces.com



Additional information and
registration available at
www.fpakc.org

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Sullivan's Steakhouse
4501 West 119th St, Leawood, KS 66209

OCT 5 | 3:30 - 6 PM

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Take 5

An update on the programs and services that make FPA *your partner in planning*.



AUGUST 2023

**Unleashing the Marketing Edge:
Seizing Opportunities for Growth**

FPA Annual Conference 2023 | Sept. 27-29 | Phoenix, Arizona

Marketing Your Business Takes Center Stage at FPA Annual Conference 2023

Suppose you want to learn what you must do today to market your business for sustained success. In that case, we have a golden opportunity for you at [FPA Annual Conference 2023](#) in Phoenix from Sept. 27-29. Join us for a can't-miss keynote panel discussion featuring three of the best minds in financial planner marketing, including Samantha Russell, Diana Cabrices, and Penny Phillips—and moderated by Justin Mack of *Financial Planning* magazine. You'll discover innovative approaches, digital tools, and compelling narratives to help you stand out! [Register today because this is an event you won't want to miss!](#)

Stay Ahead in the Fast-Moving World of Alts With UniFi By CAIA™

A new partnership between FPA and the Chartered Alternative Investment Analyst (CAIA) Association is bringing you greater access to innovative educational resources with UniFi by CAIA™. Designed for financial professionals like you, UniFi by CAIA™ offers you discounted access to a digital-first series of educational offerings. Unlock the potential of alternative investments and expand your expertise with relevant microcredentials, including private debt and digital assets. Plus, get ready for enhancements to the FAI Certificate Program. Visit the FPA Marketplace today and seize this opportunity to elevate your financial planning capabilities and open doors to new possibilities. [Learn more!](#)

The August Journal of Financial Planning Now Available

FPA members can now read the August issue of the *Journal of Financial Planning* to learn about strategies for growth, creating a personal brand, sustainable business models in financial planning, succession planning, financial planner well-being, and much more. Access the latest issue of the [Journal now](#).

Fulfill Your IAR CE Obligation with Kitces IAR CE Day on August 24

Kitces IAR CE Day is the ultimate solution for Investment Adviser Representatives (IARs) fulfilling their [CE obligations](#). Join us on August 24 for virtual sessions led by experts in ethics and regulation, earning your 6 hours of IAR Ethics CE while also gaining 6 hours of CE for CFP®, CIMA, CPA, and other designations. No vendors or sponsors, just pure, high-quality content. Plus, part of your registration will be sent to your local FPA chapter to support other programs that support YOU. Don't miss out! [Register today](#) for \$199 (general admission) or \$129 (Kitces Premier members).

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From practice management and business transitions to tax planning and wellness, wouldn't it be nice to have one dedicated resource you can go to for the latest information from reputable authorities? Well, the FPA Business Hub now makes that resource available to you. The FPA Business Hub is curating the latest content, including whitepapers, research reports, case studies, and more, to help you better serve your clients, teams, and business. New content is being added regularly, so bookmark the FPA Business Hub and see what the experts have to share. Visit www.fpahub.org to get started!



**Support the Advancement
of Your Profession**

The [FPA Political Action Committee \(FPA PAC\)](#), the only PAC focused on advancing the financial planning profession, provides an important seat at the table, forges relationships with lawmakers and their staffs, and provides an opportunity to share the financial planning story. There is much work to do and every dollar counts. To help us fight for your profession, we ask you to make a contribution to support your FPA PAC. Whether you contribute \$50 or \$5,000, every dollar is appreciated and will support advocacy efforts that move your profession forward.

[Donate Today.](#)

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Eric Martinez, CFP®, MBA, CRPC®
American Century

CALENDAR OF EVENTS

August 29, 2023

SYMPOSIUM

Embassy Suites, Olathe

September 7, 2023

NexGen Happy Hour

Johns Big Deck, Kansas City

September 20, 2023

Chapter Meeting

Embassy Suites, Olathe

October 5, 2023

Member Networking Event

Sullivan's Steakhouse, Leawood

October 18, 2023

Chapter Meeting

Embassy Suites, Olathe

October 27, 2023

Career Day

American Century, Kansas City

November 15, 2023

Chapter Meeting

Embassy Suites, Olathe

For a full list of events and registration please visit our website at <https://www.financialplanningassociation.org/fpa-greater-kansas-city-events>

