

The background is a stylized illustration of a city skyline at night. In the foreground, a bridge with a large arch is visible, its structure illuminated with a warm, golden light. The bridge's arch frames a view of a dark blue body of water. In the background, a city skyline is visible, featuring a prominent building with a tall, spire-like top. The sky is a deep blue, and several white birds are shown in flight, scattered across the upper half of the image. The overall mood is serene and urban.

Content Marketing Playbook

altruist

Contents

Why is Content Marketing so Important?

Think in Funnels

Awareness
Consideration
Evaluation
Retention

Develop Your Content Strategy

Play to your strengths
Establish discoverable entry points
Make your website speak to your ideal client
Moving them towards a decision with content

Final Thoughts

About Altruist

Why is content marketing so important?



As an advisor, content is essential to your marketing strategy. Content primes prospects before you ever speak to them, attracts the clients you want to work with and works for you 24/7, 365 days a year. In this playbook, you'll learn how to strategically think about your content, play to your strengths, establish entry points to your website, and convert prospects into clients.

Think in Funnels

What does it mean to think in funnels? A marketing funnel helps you visualize a prospect's journey from the moment they come in contact with your brand to the moment they commit to using your services. A standard funnel has five parts: Awareness, Consideration, Evaluation, Decision, and Retention. Based on where the prospect is in your funnel, you can tailor their experience and guide them towards the next step. Let's look at each section in more detail:

Awareness: Where will they find you?

Think of all the places your ideal client might be. Understanding where they are will help you craft content suitable for what they're searching for and complement the platform where they discover you. Is it through social media, paid advertisement, a publication, a youtube channel or a blog, etc.? Consider all the sources. Awareness type content should be focused on educating your audience—not selling yourself—and should include a CTA that points them back to your website to learn more.

Consideration: What will they learn about you from your website?

When a prospect visits your site, it should clearly state what your firm is about, who you serve, and how you serve them. We explain in detail how to create an effective website in the next section. Your site should make it easy for them to connect with you, so be sure that opportunity is front and center.

Evaluation/Decision: How can you use content to give them an easy decision?

A prospect who enters this part of the funnel should be familiar with you and your firm, and know what services you offer. However, they still haven't made a decision. As you continue to nurture them with educational content, you can start incorporating harder-sell messaging. The best approach is to consider their needs and position your services as the solution. The call to action for this type of content might be, "book a free consultation today to learn more about XYZ."

Keep in mind that it takes roughly eight touchpoints to close a sale. If the first touchpoint was a lead magnet, the second touchpoint could be a blog followed by an invite to a webinar, and so on.

Retention: How can content support the ongoing client relationship?

Once you have successfully converted a prospect into a client, consider creating specifically tailored content to help nurture the relationship and strengthen the trust between you and your client. Content examples to include for retention would be ongoing help and educational articles, personalized performance emails for their accounts, surveys and polls to gauge how they feel about your services, etc.

Other things to consider in addition to thinking in funnels

Consider the prospect journey. If your target audience is nearing retirement, you probably don't want to spend too much time creating content on TikTok. It's essential to think about all the financial life events they may face and build content they can easily find.

Timing is critical. You don't want to push a prospect before they're ready to become your client. The best approach is to consider the prospect's journey. Where in their life events will your services be needed the most? Maybe they're planning to buy a home in a few years and need a financial plan to realize this. Or perhaps they're considering making a change from one advisor to another.

Okay, now that you have an overview of operating in funnels, how do you fill them?

Develop Your Content Strategy

Play to your strengths

Here's the good news; you don't have to create for every single platform to make an impact with your target audience—you can choose the best mediums for you and do them well. That's also why we've decided to highlight the best mediums we've seen for financial professionals. If you're not a great writer, consider creating video content. If you don't like yourself on camera, consider starting a podcast. If you don't like the sound of your voice, then maybe infographics and pictures are better suited for you.

Whatever you choose, make sure it's something you enjoy. If you're uncomfortable doing it, your audience will see it, which may turn them off. If you're passionate, that energy will be compelling. If you don't enjoy the process, it's going to be hard to be consistent. And consistency is vital when it comes to content marketing.

Establish some discoverable entry points

SEO optimized blogs

There's a reason practically every advisor has a blog. According to Hubspot, [blogging leads to 55% more website visitors](#). Plus, it's a great way to raise awareness, increase engagement, and showcase your expertise to website visitors, and it helps tremendously with SEO. Also, blogs are valuable for capturing leads (using an enticing CTA) while organically building a connection with your audience.

Here is how to start producing content that gets you traffic:

Create content for the specialized search phrases your audience is searching for.

As we discussed, focus on what your audience is trying to solve. Make sure these key search phrases are in the URL, header, and sprinkled throughout the blog when it makes sense. Hint *there's such a thing as over-optimization of a page. Don't go overboard with the keyphrase/keyword—be strategic with it.

Formatting your articles

- Include keywords/phrases in the headline and intro paragraph.
- Add a “key takeaways” or “table of contents” section at the beginning of the article.
- Make it skimmable and easy to read.
- Get to the point. No run-on sentences, and don't deviate from the question you're trying to answer.
- Make it relatable, including real-life examples.
- Make sure to proofread. Services like Grammarly or Writer are excellent for editing (and can help with writing too).
- Add compelling images to break up the copy, and bonus tip: be sure to fill in the “alt text” with your keyword/phrase. It's not a huge lift, but it doesn't hurt.
- For more tips, check out this article from HubSpot.

YouTube

YouTube is the world's second-largest media platform. It's a fantastic platform to build brand awareness while creating trust with viewers. It can also help with your SEO strategy. More importantly, YouTube allows advisors to showcase their personalities and human side. It's an excellent primer for your audience to get to know you before they speak to you—and it's up 24/7. Talk about getting the biggest bang for your buck! One successful financial professional on youtube is James Conole, CFP. His channel for Root Financial has garnered over 16K subscribers! Here's what you can learn from James:

- **Design:** It's pleasing to the eye. The design is consistent throughout: from the top banner to the video thumbnails and how he sets up his videos.
- **Specialization:** As soon as you land on James' channel, you know it's all about retirement. His mission statement is clear; viewers know what they will learn by watching and subscribing to his channel.
- **Clear CTA:** James included a link to his website in the banner, including his social media handles. He also includes this in his video descriptions. The viewer always knows how to get in touch with James.
- **Intentional videos:** You can see that every video James has created is tailored to answer a question that serves his ideal client. Plus, his videos are aesthetically pleasing and easy to follow. They include visuals, and he speaks in plain English, that's easy to understand. He also includes timestamps and additional information in the description, making it easy for viewers to jump to what they want to know.
- **Tagging videos:** Each video on his channel includes search phrases that clearly define the video. Doing this helps the videos rank in YouTube searches and in Google. Hint: Youtube also offers generic keyword tags; choose the ones most relevant to your content.

LinkedIn

As an advisor, your community is very important, so we're including LinkedIn. It's a great place to connect with like-minded individuals, but more importantly, you can also connect with your ideal clients. Derek Notman, CFP, has done a fantastic job building a community on LinkedIn. He has over 27k followers on the platform. Check out [his page](#), and you will see why. Here's what you can learn from Derek:

- **Profile:** From the banner to the headline, you know who Derek is and who he serves. He has done a great job incorporating everything he offers and tags his profile correctly. So anyone searching the LinkedIn database (or even Google), Derek will show up in the results for his target audience.
- **Posting:** As with any social media platform, consistency is critical. Derek constantly posts articles that are insightful and educational for his audience. The visuals are easy to look at, and he tags his posts, so they appear in the right searches. This is also a great place to post content from your other channels.
- **Conversational:** Derek's tone and voice are human and casual. It is not overly salesy. He can just be himself, and people gravitate toward those who are authentically themselves.
- **Engagement:** Derek responds whenever someone leaves a comment on his posts. Engaging with comments shows that you care about what they're saying. It helps build an authentic connection. A quick caveat to this, it may not be possible to respond to every comment and message you get, and that's okay. Just use your best judgment and do what works best for you.
- **Tagging videos:** Each video on his channel includes search phrases that clearly define the video. Doing this helps the videos rank in YouTube searches and in Google. Hint: Youtube also offers generic keyword tags; choose the ones most relevant to your content.

Make sure your website speaks to your ideal client

Your website is your firm's virtual storefront. If your website isn't speaking to your ideal client, you're losing money. Additionally, if your website isn't easy to navigate or pleasing to the eye it's very likely that your target audience will bounce. That's why it's essential to focus on creating a good website first and foremost. If you're not a pro at building a website, opt to hire someone who is. It's worth the investment.

Your website's purpose is to help potential clients determine if you're the right financial professional to help them with their financial journey. Therefore, you must ensure your site is tailored toward the clients you want to work with. Here's an excellent example of a firm's site, and here's some general guidance on what to include on your homepage:

- **Who do you serve, and how do you serve them?** This should be at the very top of your website. As soon as someone clicks on your website, they should be able to answer this question within a few seconds.
- **Benefits of what you do.** Explain the advantages of working with you. Are you fee-based? Fiduciary? Tax professional? You can convey this message using a simple visual.
- **The services you offer.** List every service you offer that helps your prospects, from investment management to retirement planning, etc. As with the above, you can also list this using a visual.
- **Your mission statement.** This is where you articulate why you started your firm and what you aim to accomplish. Your mission statement will also help you stand out from the competition.
- **Call to action.** It's vital to have a clear call to action and make your contact information visible at the very top of your site. Make it easy by placing it above the fold. This way, they can find out how to get in touch with you without scrolling around.

Move them towards a decision with content

Once your top-of-the-funnel content drives a healthy amount of traffic to your website, it's time to incorporate content that helps move your prospects further down the funnel toward becoming a client. This content will continue to be educational but will include more information about you and your specific services and will have a much stronger call to action.

While there are plenty of mid-funnel content ideas to choose from, we'll keep it simple and share the ones we've seen advisors succeed with: newsletters, lead magnets, and podcasts. Since newsletters are probably the easiest to create of the three, we'll start with it.

Newsletters

Newsletters are a great way to keep the conversation flowing with your target audience. An advisor can use this to explore topics of interest, firm announcements, and anything their audience would find valuable. So if you're an advisor who enjoys writing and writes consistently, then newsletters are perfect for you. Ben Carlson of Ritholtz Wealth is stellar at creating newsletters for his followers. He shares a solid perspective on topical material that matters to his target audience. His newsletter/blog is called "[A Wealth of Common Sense](#)." Pretty catchy for the financial industry, if we do say so. Tips on how to create a newsletter your audience will want to read:

- **Write a compelling subject line that explains the topic.** As a rule of thumb, keep your subject line between 30-50 characters, including spaces. The subject line should evoke some intrigue or urgency, prompting your audience to look and read through it. Don't be afraid to test ideas to see what works for your audience.
- **Follow the 90/10 rule:** 90% educational content and 10% promotional. There is nothing worse than getting hit with a constant barrage of promotional content—which can result in unsubscribes. Instead, remember the newsletter is another way to build trust and confidence with your audience while nudging them to take action towards becoming a client. So the primary focus should remain on educating your audience. Then sprinkle in a few harder-sell newsletters when it feels appropriate.
- **Have one direct call to action.** You may have seen newsletters with multiple CTAs, but it is more effective to have just one. What's the primary action you want your readers to take? That CTA should be front and center. If you plan to have more than one CTA, put the others under "additional resources" at the bottom.

-
- Keep the design consistent with your brand's look and feel. Your audience should be able to recognize your email because it's compatible with what you're putting out. This means you must ensure the tone, font, and color of your email complement other emails you've sent. Quick caveat here, simple is better.

Lead Magnets

A lead magnet is a gated piece of content designed to capture someone's contact info in return for something. Lead magnets can also be viewed as an entry point if you promote them through social media or paid ads. Here's how to create an eye-catching lead magnet:

- **Write a compelling title:** The title should quickly summarize what the lead magnet offers. For example "5 tax-smart ways to boost your business in 12 months". It tells the reader precisely what they're in for and speaks directly to the business owners he aims to serve.
- **Design matters:** This might be repetitive throughout this playbook, but it's vital to your content, especially a lead magnet. Your prospect gave you their information to receive this, so make sure it looks sharp and reflects your brand.
- **It's easy to digest:** Don't overcomplicate, and aim to keep it specific. Like how you format your blog or newsletter, you will want to approach a lead magnet similarly. Give your audience exactly what they signed up for and speak to their struggles. It should be easy to read and consume and include actionable steps they can take.

Topic ideas to help you get started: 5 ways to set up a financial budget for XYZ, A guide to understanding your risk tolerance, A retirement planning checklist, A financial checklist to set up your small business.

Aim to develop comprehensive workbooks, how-to guides, calculators, and informational checklists that speak directly to the needs of your ideal client.

Podcasts

Podcasts can fit anywhere in the funnel. However, we decided to place it in this section because it's a great tool to nurture an ongoing relationship with prospects and clients. Creating a niche-focused podcast also helps support your SEO efforts and increases your credibility—especially in combination with the other content you're making. And if that weren't enticing enough, according to [a report from Insider Intelligence](#), the monthly US podcast listeners will increase by 6.1% year over year to 125 million. So that's a good reason why advisors are jumping to create podcasts.

An advisor who has been a trailblazer in the podcasting space is Taylor Schulte, CFP. He has a series called "[The Stay Wealthy retirement show.](#)" What you can learn from Taylor's podcast:

- **Topics:** Think about your conversations with clients. What questions consistently pop up? What are your clients most concerned about? Starting with your audience's pain points is a great way to start coming up with topics to discuss. Planning episodes for a podcast is similar to how you would structure a blog: Ask the question, answer the question with supporting information.

Timing and flow: Your podcast should roughly follow the same flow every episode. It helps your audience build a connection to your brand when you do. Try to keep your episodes to 30 minutes or less if it is just you (if it's you and a guest, it's okay to go over). You will notice on Taylor's podcast that very few episodes go past 30 minutes.

- **CTA:** Most podcasts will have a CTA at the beginning and end of the podcast. In Taylor's podcasts, he encourages listeners to subscribe to the complimentary newsletters he offers, plus a link in the description. In the end, he shares how his listeners can get in touch with him, which is also linked in the description.
- **Promotion:** Be sure to share your podcast on your website, and post new episodes on all your social media channels. You can also cross-promote it in your newsletter.

Here are a few additional in-depth resources for starting a podcast: [Buzzsprout's complete guide](#).

Final Thoughts

Content marketing can be challenging. Building and executing a strategy that works for your business takes time and effort. We created Altruist, to help independent advisors unlock time and budget, so you can focus on what really matters: creating an exceptional experience for your clients, and acquiring new ones. To learn more, visit altruist.com.

About Altruist

The right custodian should offer technology that enhances your firm's operations, supports your fiduciary duties through performance-enhancing tools, and provides an intuitive, efficient user experience for both advisors and clients. This choice is not merely about the custody of assets but about selecting a partner that aligns with and supports the strategic direction and values of your firm.

To learn more about Altruist as a custodian and long term partner, we encourage you to connect with our team.

[See if you're a fit](#)

Altruist Corp (“Altruist”) offers technology and tools designed to help financial advisors achieve better outcomes. Advisory services are provided by Altruist LLC, an SEC-registered investment adviser, and brokerage related products and services are provided by Altruist Financial LLC, a member of FINRA/SIPC. Nothing in this communication should be construed as an offer, recommendation, or solicitation to buy or sell any security. Additionally, Altruist or its affiliates do not provide tax advice and investors are encouraged to consult with their personal tax advisors. Clearing and custody of securities provided by Altruist Financial LLC.

altruist

© 2025 Altruist Corp

3030 S La Cienega Blvd
Culver City, CA 90232
