



Things I Wish I Knew: Marketing Like a Rock Star

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NAIFA members Carina Hatfield, Rob Landgraft, Ryan Jewel, Kathleen Owings, and Chris Robinette share their experiences as young advisors and offer marketing ideas that helped them get over early-career humps and find business success.

Carina Hatfield

NAIFA-Pennsylvania President and 2020 NAIFA Young Advisor Team Leader of the Year Carina Hatfield spoke about gifts and giveaways, branding, networking, and sponsorships. Gifts and giveaways can be important marketing tools, she said, but they are also an expense and a commitment. If clients receive an annual gift, many will expect to continue receiving such giveaways. As your book of business grows, so does your expense. Giveaways, in Hatfield's experience, sometimes reflect her agency brand and sometimes reflect the brands of the products she provides, depending on the audience.

Networking, Hatfield said, is a matter of being where your ideal prospects are or creating a center of influence among other professionals, such as attorneys or business owners, who are in front of prospects and can recommend you. Sponsorships also help to raise a financial professional's profile. They will be most satisfying when you sponsor events or causes that are meaningful to you, Hatfield said, and most effective when they are meaningful to your ideal clients.

Rob Landgraft

Rob Landgraft, Past-President of NAIFA-Minnesota, is a fee-based financial planner. He emphasized that his connections with other professionals who offer products and services that complement his own planning help him attract and keep clients. These include tax advice, risk management, and estate planning pros. Landgraft's connections through NAIFA have provided contacts who can help his clients in these areas and who, in return, can refer additional clients back to him.

The most important key to success for an advisor, Landgraft said, is establishing trust with clients. He builds trust by being genuine (in person and online), being confident but not arrogant, being accountable, having a professional process in place, using an investment policy statement, setting expectations and delivering on them, making recommendations that don't always make him money, and making recommendations that he personally would accept if he was the client. It is important to concentrate on the needs of the client. "Things that matter to me don't matter to clients," he said.

Ryan Jewel

The host of "Millennial Money Matters," Ryan Jewel, spoke about content creation and podcasts. In terms of visual marketing, like videos, podcasts or even online client meetings, appearances matter. Invest in a good setup and background and make sure you "look sharp," and are dressed professionally and with a good haircut. Consider the lighting and have a nice microphone, he said.

When creating visual content, or any content, it is beneficial to build a "dynamic relationship" with your compliance department, Jewel said. Be friendly and show appreciation for compliance officers who help you make your content public. Be creative and engaging and keep your content simple.

But most important is to simply get started. Jewell said he likes to emphasize “progress over perfection.” Your content doesn’t have to be perfect starting out. “The bottom line is, we’ve got to start somewhere,” he said. “The best day to start with content creation was yesterday, so the next-best day is today.”

Kathleen Owings

In independent, comprehensive financial planner from Colorado Springs and a West Point graduate, Kathleen Owings spoke about how technology is an important part of her success. COVID-19 has made technology and virtual meetings more relevant and more acceptable to all of Owings’ clients, not just her younger clients or those who are tech savvy.

Key technology Owings uses in her firm to best serve her clients include a customer relationship management (CRM) system, electronic forms, online questionnaires, and scheduling software. Technology, including her website, videos, and virtual meetings, is also important to her marketing. These should all focus on making the experience better for the client. “People are much more likely to buy from you and do business with you when it’s easier,” she said.

She is always looking for new technology “that’s going to connect me better with my clients” and reduce the “friction points.”

Chris Robinette

A comprehensive fee-based financial planner from Nashville, Chris Robinette spoke on marketing hits and misses. He suggest avoiding talking too much about yourself with clients, but always leading with a story. “Focus on something that can bring out a conversation and make them want to go deeper,” he said. “Because if you’re constantly listening to people and you maintain your integrity and you maintain your honesty and transparency, people will like you and they will want to talk to you.”

Earning warm leads beats pursuing cold leads every time, he said. He has built his business through getting referrals and networking. Success comes from making personal connections. You can create those by telling stories and listening to other people’s stories.

“People don’t want insurance. They don’t want investments,” he said. “They want a conduit and you are the conduit to get people from point A to point B, to get them out of debt, to figure out their cash flow, figure out what they’re doing in life.”