

# Financial Advisors – Writing to Get Your Message to Your Target Audience

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# Financial Advisors – Writing to Get Your Message to Your Target Audience

- *Make it about your audience, solve THEIR problems*
- *Establish yourself as an expert, but don't be too technical for your readers*
- *Write with a purpose – educate, disturb, motivate*
- *Who – What - Why*

# Who What Why

- These three words should define your writing strategy.
- Who are you writing for?
- What do you want the reader to do?
- Why are you writing?

# Who

- **Who** is your target audience? – Niche it down
- Boomers nearing retirement
- Single women – widows/divorced women/never married
- Retirement plan sponsors
- Doctors
- Teachers
- Other professionals/centers of influence

Each of these groups have their own unique issues, concerns and financial advice needs.

- What are the unique financial issues your target audience is concerned with?

# What is my message for my target audience?

- Highlight a specific problem or issue relevant to them.
  - Get them thinking about that issue
  - Show them you understand the issue
  - Suggest some solutions to their problem

Don't be afraid to reveal the "secret sauce." Most of your readers want to find someone who understands their issues, very few really want to do it themselves.

# Why Do I Want to Write?

- Why do you want to write?
- Because you keep hearing the message that financial advisors need to write/use content marketing?
- Brand awareness
- Establish yourself as an expert with your target market
- Build and online presence, SEO
- Stay in front of clients/prospects/centers of influence
- Inform prospects, provide a call to action

# What are my goals for writing?

- Build awareness
- Establish thought leadership
- Network with allied professionals
- Generate more business

# What type of information is appropriate for my audience?

- What is unique about your target audience?
- What are their key financial priorities?
- What are their key financial concerns?
- What is the message you are seeking to convey?
- What do you want your readers to do once they've read your post/article, etc.?



# What is the best way to reach my audience?

- Blog posts/articles
- White papers
- Guest posts on US News, Investopedia, etc.
- Newsletter
- Other
- Social media

# What Problems Can I Help My Readers Solve?

- Determining how much I need to save for retirement.
- As a plan sponsor, what process should I use to manage our plan's investment menu?
- Balancing paying professional school loans and saving for retirement.
- What impact does the new tax law have on my freelancing business?
- As a teacher can I still get Social Security?
- What impact does inflation could inflation have on my retirement?

# What Action Do I Want my Readers to Take?

- Contact me
- Keep me in mind/recognize my name
- Refer business

# Baby Boomers nearing retirement

- Will they have enough to retire?
- How will they manage the cost of healthcare in retirement?
- Withdrawal strategy-which accounts and in which order?
- How should they invest their money to reduce risk but still maintain growth?
- The impact of taxes in retirement?
- Managing Social Security and Medicare

# Retirement Plan Sponsors

- Meeting their fiduciary obligations
- Providing a viable retirement solution for their employees
- Avoiding a lawsuit
- Should we hire a 3(38) fiduciary?

# Single women – widows/divorced women/never married

- What do I do now, my husband always managed our money?
- Saving for retirement on my own
- How do I balance being a caregiver and saving for retirement?
- Estate planning as a single person
- What do I do financially in my first year as a widow?
- What are my Social Security options in terms of benefits based upon my ex-husband's earnings record?

# Doctors

- Paying off medical student loans
- Choosing the right financial advisor, not falling for every financial pitch you receive
- Pros and cons of starting your own practice
- Financial aspects of starting/running your own practice
- Retirement planning options

# Freelancers

- Choosing the right business entity form
- Setting up a financial system, managing taxes
- Retirement plan options for the self-employed
- Impact of pass-through rules of new tax law



# Teachers

- Maximizing their retirement plan options
- Am I eligible for Social Security?
- Managing your paycheck during the school year
- Is my pension in danger?

# Other professionals/centers of influence

- Sources of referrals
  - CPAs
  - Other financial advisors
  - Estate planning attorneys
  - Realtors
  - Others
- Building relationships to assist your clients
- Opportunities you've never considered
- Show you are the expert in your niche

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