

Broker Dealer Recruitment Marketing Package

Advisor Seminars

Broker Dealer Advisor Recruiting Challenges

- **Experienced Advisors are in Demand** - Total number of advisors has dropped to roughly 301,000, down 11% from its peak in 2005.**
- **Career Choice** - For finance and business grads, a financial planning isn't necessarily career doesn't jump out as a viable option given the pay for performance associated with becoming an advisor.
- **Aging Professionals** - Today, the average age of a financial advisor is 51 with 38% of advisors expecting to retire in the next 10 years and just 10% of financial advisors today who are under age 35.*
- **Total Advisor Population -THE BREAKAWAY ADVISOR** - 69% of breakaway advisers, say that a "desire for greater independence" is a "major factor" in their decision to move firms. At the same time, 56% said "concerns about quality of broker-dealer's culture" was a "major factor" in their decision.*



*Cerulli Associates 2017

**Tiburon Strategic Advisors Research

The Gap and The Need

- Many advisors are retiring
- The recruitment pipeline isn't keeping pace of those advisors aging out of the workforce

THE NEED

- Create a targeted recruitment message in the digital channel that:
 - nurtures potential candidates repeatedly thereby reaching, attracting and competing for these high value professionals



Advisor Solutions Recruitment Marketing Package

Custom designed recruitment website with pages focused on:

- ✓ About the Broker Dealer
- ✓ Why join
- ✓ About the Recruiter
- ✓ How to become a part of the team
- ✓ FAQ's
 - Account opening and management process?
 - How compliance and supervisory processes work?
 - Technology offering
 - Advisor freedom and control?
 - About the broker-dealer's primary revenue sources
 - Investment Choices/flexibility
 - Fee schedule / Commission Schedule
 - BD Support, Marketing, Time Savers

Sphere Recruitment Advertising

High Likelihood
Prospects



Local Financial
Advisors



Sphere of influence

RIA's and
Smaller BD's



Past Prospects

Recruitment
Lists



Mobile, Facebook, Web



Retargeting and Sphere deliver detailed reporting





- 3 out of 5 US Internet users, said they notice ads for offers, products or services previously viewed online.

It's all about repetition: The average person needs to see a recruitment ad 7 times before he/she responds, or even remembers...



Retargeted ads led to an **1046%** increase in branded search and a **726%** lift in site visitation after four weeks of retargeted ad exposure!

