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

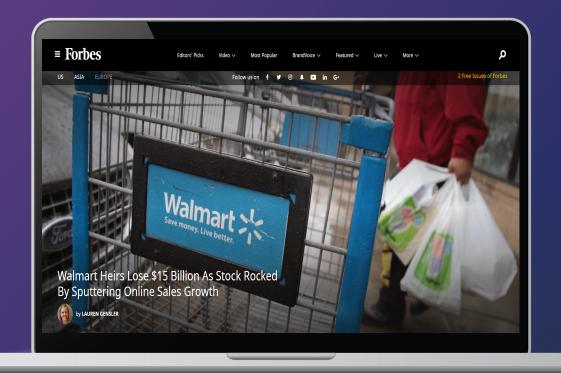
Custom designed recruitment website with pages focused on:

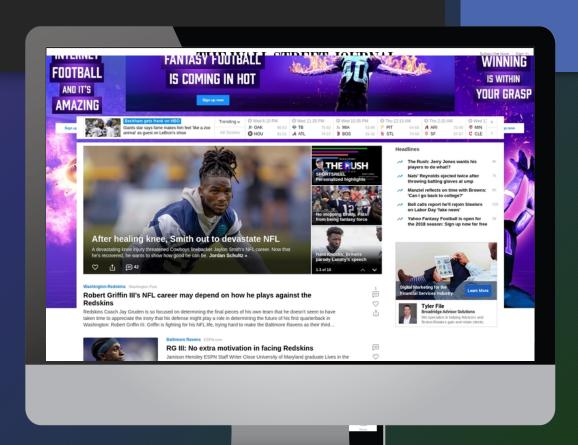
- ✓ About the Broker Dealer
- ✓ Why join
- ✓ About the Recruiter
- ✓ How to become a part of the team
- ✓ FAQ's
 - Account opening and management process?
 - How compliance and supervisory processes work?
 - Technology offering
 - Advisor freedom and control?
 - About the broker-dealer's primary revenue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

Sphere Recruitment Advertising

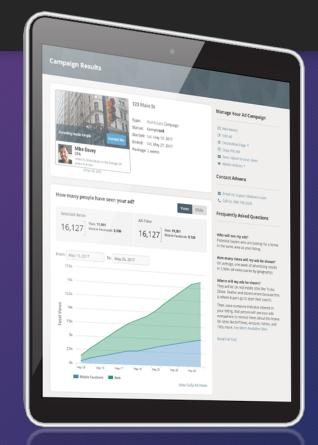


Mobile, Facebook, Web





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!

