



# **AI Powered Advisor Marketing**

**Real World Tactics To Build Relationships At Scale**



# What we'll cover today:

1

How to use AI for **content creation, engagement, and compliance.**

2

**Live demos** of AI-powered tools in action.

3

How to **avoid AI mistakes** and maximize impact.

4

How to **integrate AI tech** to speed up workflows and reduce manual tasks



# Get the slides and free compliance tool in your inbox after the webinar:

- ✓ Slides from this Webinar
- ✓ Ad Copy Compliance Tool



## Financial Services Marketing Ad Copy Grader

 Community Builder

Get help creating compliant marketing materials by assessing your ad copy against FINRA and SEC guidelines. This tool is designed to assist with compliance but does not replace professional legal or compliance advice. All marketing materials should be reviewed and approved by a qualified principal.







**The financial industry's AI spend is projected to grow from \$35 billion in 2023 to \$97 billion by 2027 – a staggering 29% annual growth rate.\***

\*Forbes



**Advisors and marketers who use AI will grow faster.**





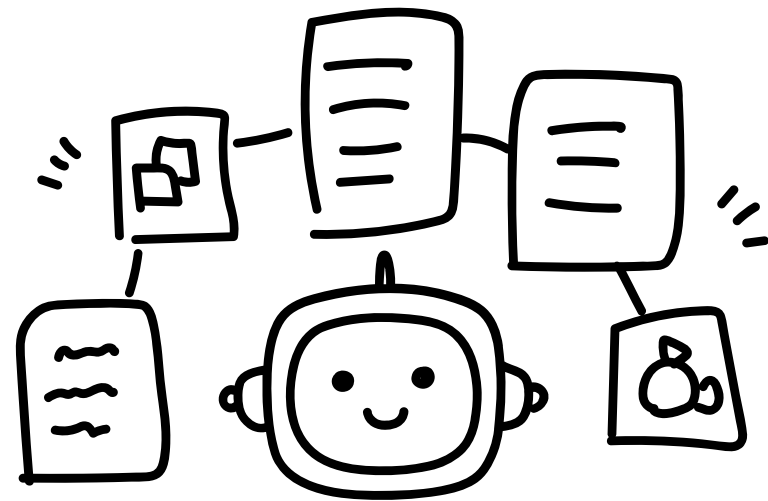
**TIME**





# Time is the biggest bottleneck in advisor marketing

AI removes the friction from idea to execution... **but only when used correctly.**



# Two Primary Marketing Functions for AI



## Generative AI

Creates content (written, images, video).



## AI-Enhanced Tools

Analyzes data and automates tasks.



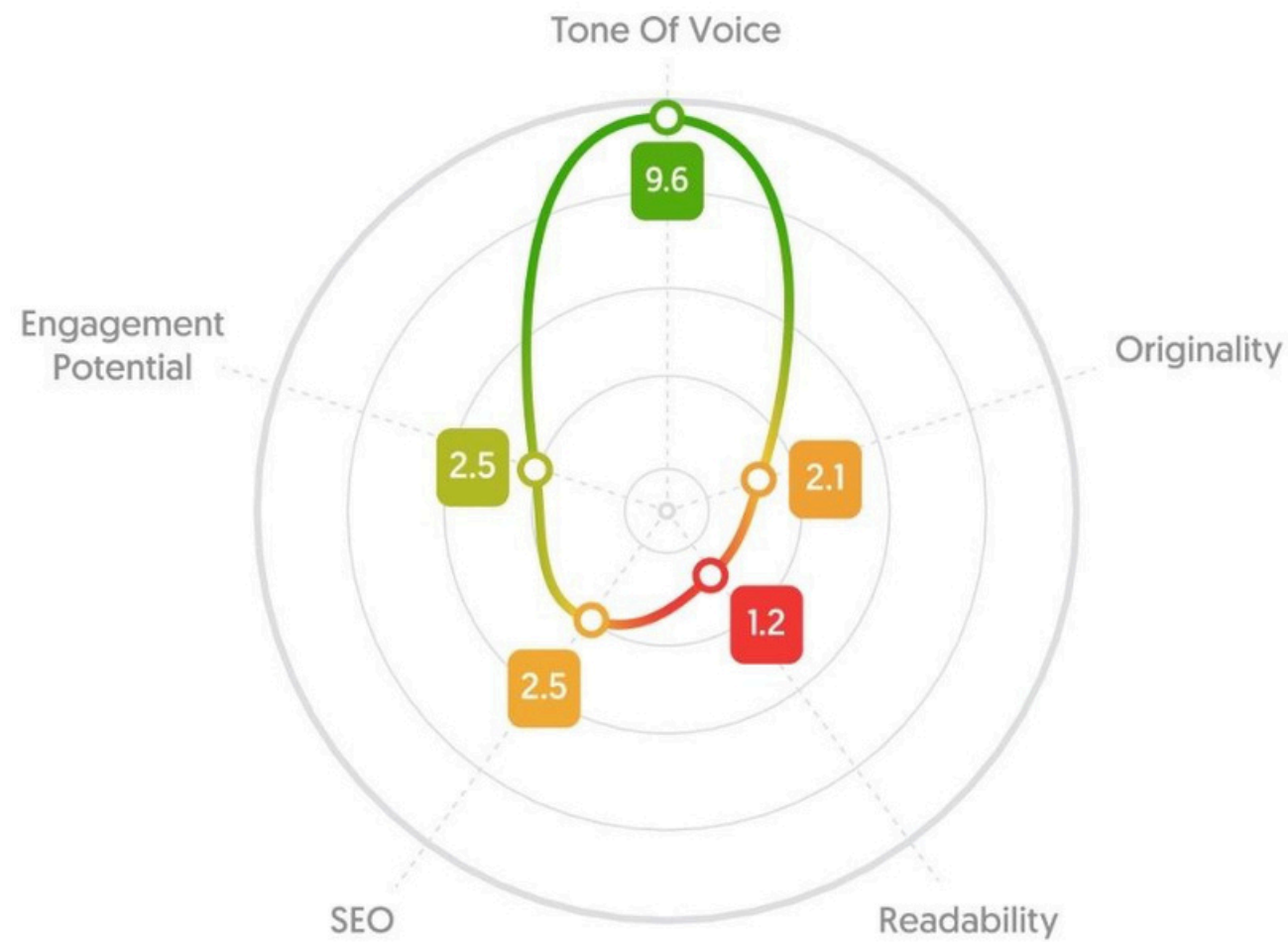


# Generative AI In Action

More high-quality content with less effort

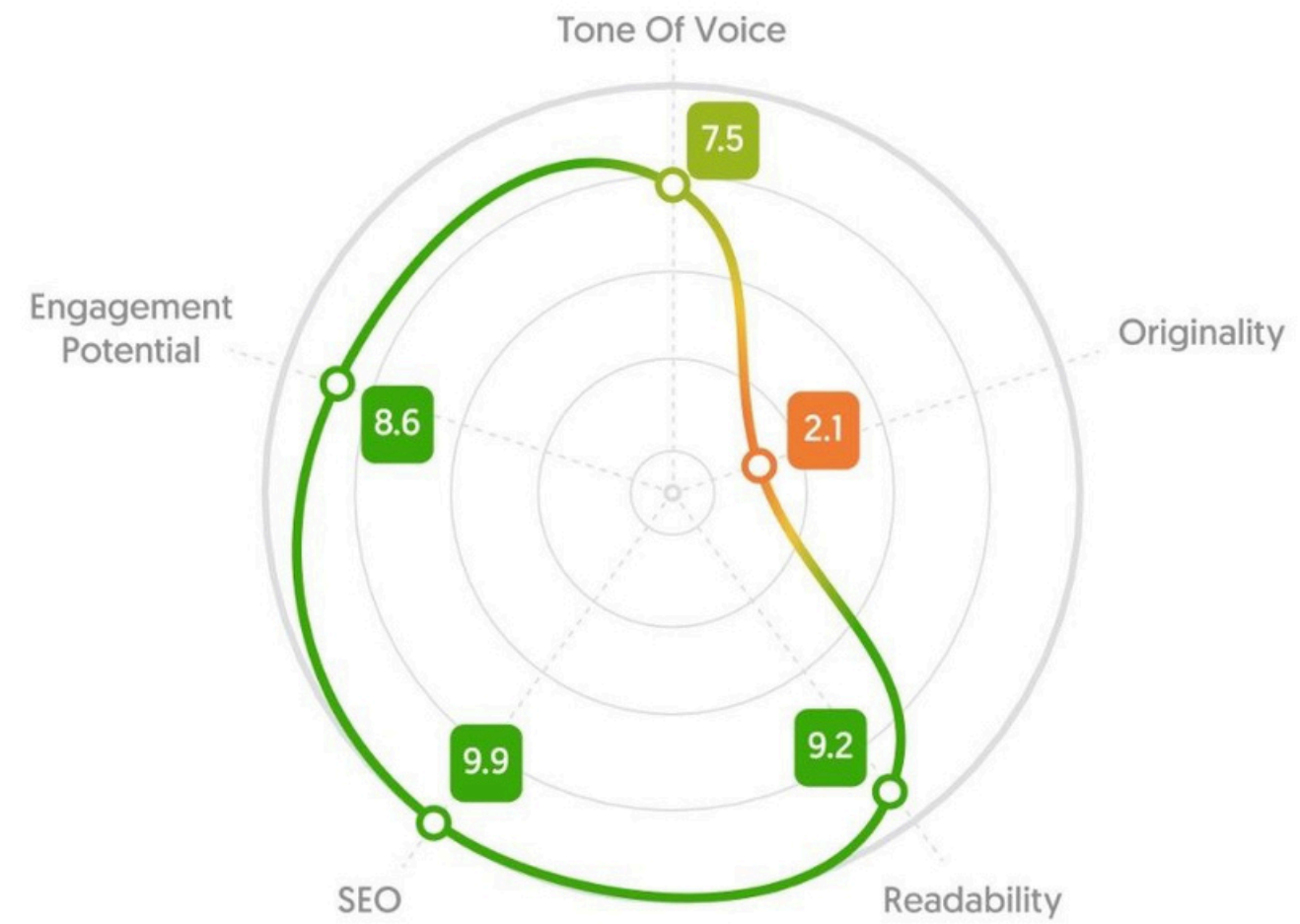
# H.I.T.L

**Weak: 3.6/10**



**100% AI**

**Excellent: 7.5/10**



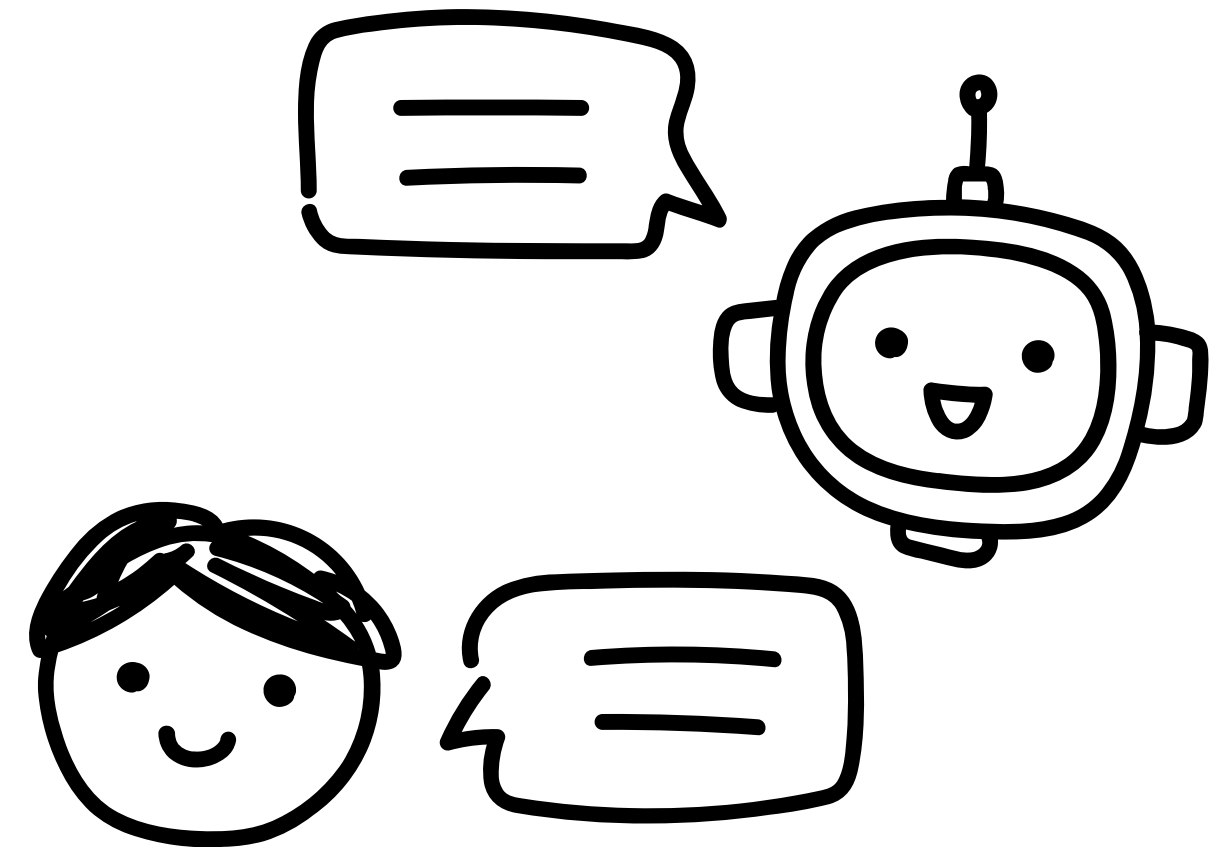
**AI + Human**





# AI as the Ultimate Collaborator

- Ideation and refinement
- Spark fresh ideas and quickly rewrite
- Maintain control over tone, narrative, and authenticity by keeping the final creative decisions in-house



# 6 AI prompts for Financial Advisors



## Email Campaign Creation:

"Write a professional email introducing [topic, e.g., financial planning for new parents] to my clients, emphasizing [specific benefit or emotional connection, e.g., peace of mind]."



## Social Media Ideas:

"Generate 3 engaging social media post ideas to explain [topic, e.g., the importance of retirement planning] in a way that connects with [specific audience, e.g., Gen X professionals]."



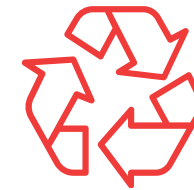
## Video Script Draft:

"Write a 1-minute video script to explain [financial concept, e.g., compound interest] in simple, relatable terms, using a conversational tone."



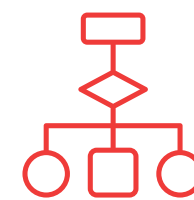
## Blog Outline Generation:

"Create an outline for a blog post about [topic, e.g., navigating market volatility] with an introduction, 3 actionable tips, and a closing call-to-action."



## Content Repurposing:

"Rewrite this [existing content type, e.g., email or blog excerpt] into a LinkedIn post targeting [audience, e.g., young professionals starting their investment journey]."



## Event Marketing Plan:

"Create a marketing plan to promote a [webinar/seminar/workshop] on [topic] for [target audience]. Include strategies for promotion and follow-ups to maximize attendance and conversions."



Single Point Solution vs. Snappy Kraken...  
which one should you use?



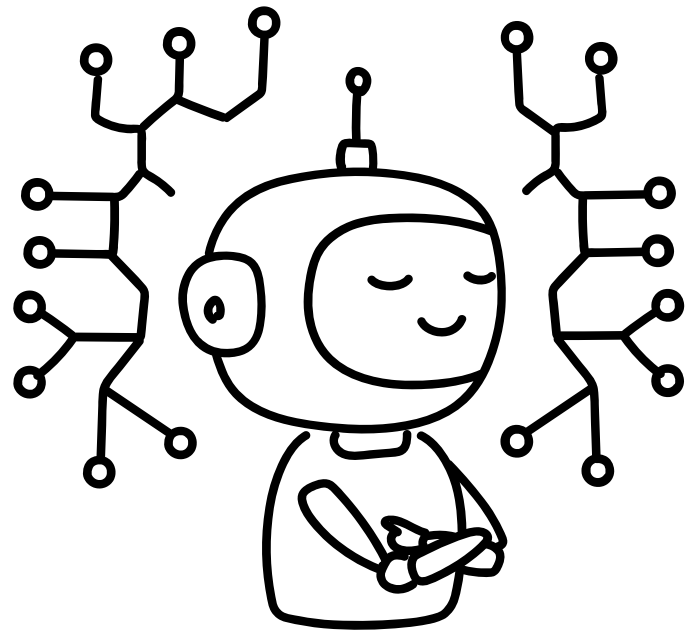
Simple answer?

Both.



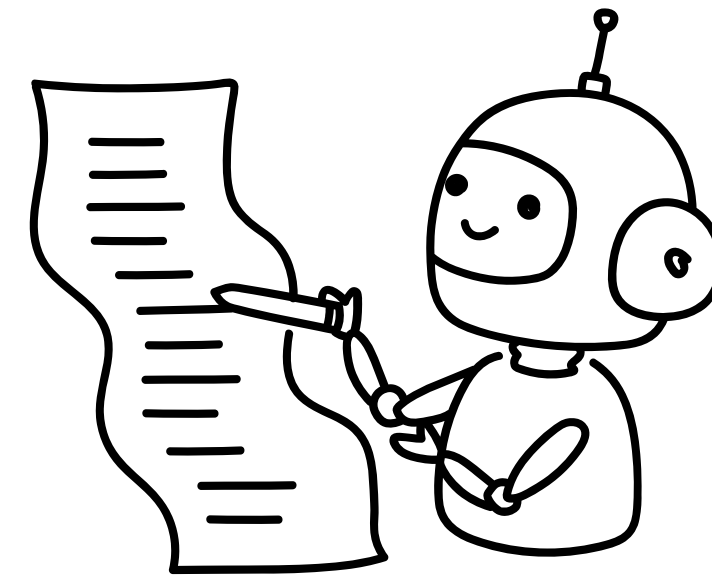
# ChatGPT / Claude, etc.

- Brainstorming campaign ideas and hooks
- Creating strategic marketing plans
- Analyzing large data sets or content pieces



# Snappy Kraken

- Refining existing content to match your voice
- Quickly launching emails and social posts
- Creating custom images for your campaigns
- Avoiding copy/pasting back and forth





**DEMO**



# AI Image Generation

Custom campaign images in minutes

# Snappy Kraken's AI Can Generate More Than Just Text

- Create custom images for your campaigns
- No more relying on generic stock photos
- Unique, personalized visuals (with your brand colors) created in seconds
- Guided, step-by-step process



*Actual images from Snappy Kraken's AI*



**DEMO**



# AI & Compliance

Why it matters more than ever

# AI Creates Content Fast, But It Doesn't Understand Compliance

- AI can generate risky content without realizing it
- Regulators are paying close attention
- If you're using AI, you need compliance safeguards





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**DEMO**

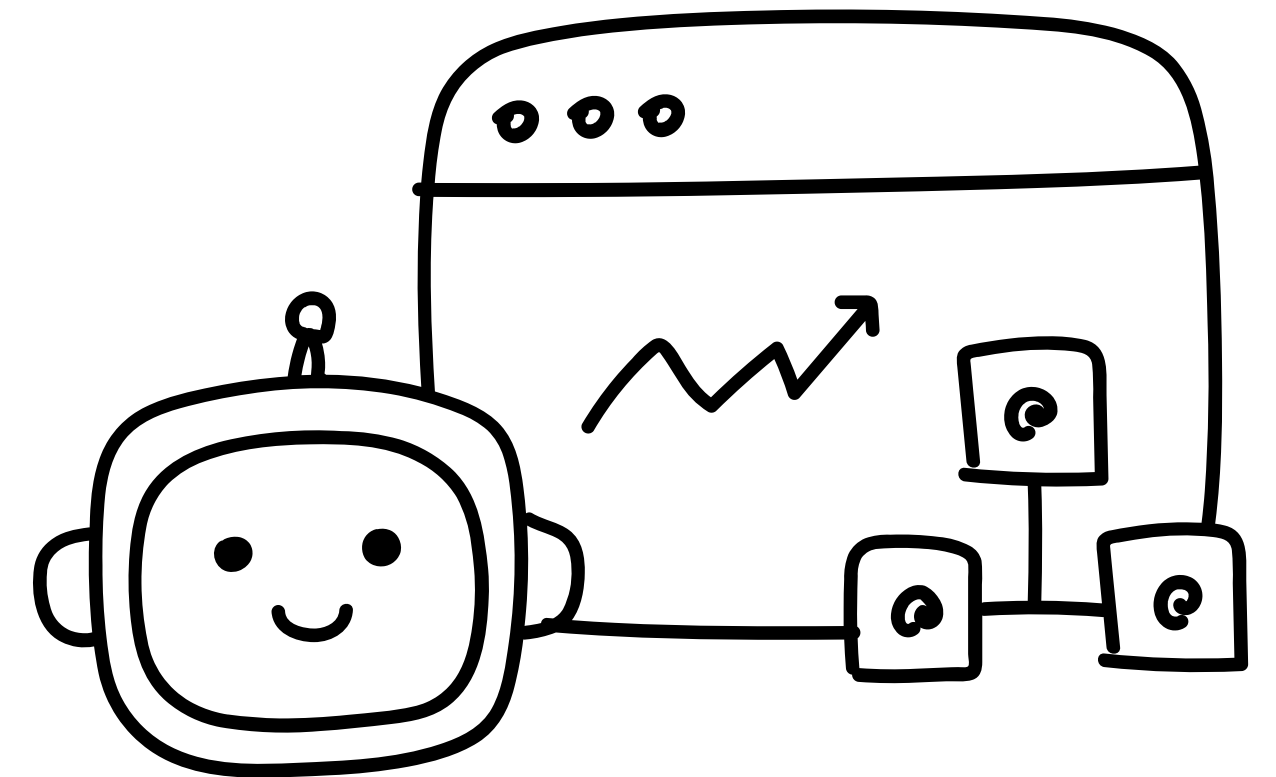


# AI-Enhanced Marketing Tools

Automated Engagement & Opportunity Surfacing

# AI-Enhanced Tools Move Beyond Content

- Identify the best prospects for follow-up automatically
- Analyze engagement data to find warm leads
- Scale personalized outreach - without more work



# The Marketing Hub

Automatically surface your best opportunities and make it one-click simple to deploy the right message, to the right person, at the right time.

The screenshot displays the Marketing Hub interface. At the top, there are navigation tabs for Home, Calendar, and Insights. The main content area is titled "See your opportunities below" and features three filter tabs: All Opportunities (selected), Content, and Engagement. Below these tabs, there are two identical "New Form Submission" notifications. Each notification includes a timestamp (9:32am and 9:31am on Tue Jul 30), a description of the submission, and a list of contact details: Campaign (Roth Conversions Lead Generation Campaign), Name (Harry Collier), and Email Address (harry.collier@gmail.com). A button labeled "Email Harry" is visible at the bottom of each notification. On the right side of the interface, there is a "90-Day Growth Flywheel" section with three sub-sections: "Get Noticed" (208 Clicks, 15 Views), "Social Posts Published" (0), and "Grow Audience" (144 Total Contacts, 2 Texts Opt-ins, 0 Website Leads).



# AI Lead Capture Inboxes

Effortlessly transform lead notification emails into actionable contacts. AI Lead Capture Inboxes let you automatically add new segmented contacts to Snappy Kraken, no integration required.

The screenshot shows the 'AI Lead Capture Inboxes' section of the Snappy Kraken interface. On the left is a dark sidebar with navigation options: 'MY CONTACTS', 'Contacts Dashboard', 'All Contacts', 'Groups', 'Import & Sync History', and 'AI Lead Capture Inboxes' (which is highlighted). The main content area has a title 'AI Lead Capture Inboxes' and a descriptive paragraph: 'When a lead notification email is sent to one of your lead capture inboxes, it is automatically saved to your contacts and selected contact groups. Simply add each inbox to its specific lead provider. Please note that having auto-subscribed campaigns for your contact groups may result in excessive communications for new leads.' Below this is a form with a 'Lead Source Name' input field and a teal 'Create Lead Capture Inbox' button. The interface lists three existing inboxes: 'Advisor World Leads' (with 'Add to: Select Contact Groups'), 'Financialize' (with 'Add to: 2 Contact Groups'), and 'SmartAsset' (with 'Add to: 1 Contact Group'). Each entry includes a unique email address, a 'Copy email' button, and a three-dot menu. A dropdown menu is open for the 'Advisor World Leads' entry, showing 'Rename Lead Source' and 'Delete Inbox' options. A gear icon is visible at the bottom left of the sidebar.

# AI-Enhanced Outreach

Effortlessly transform cold opportunities into warm prospects. AI will analyze the lead source and context to provide pre-written, appropriate next-actions you can take with one click.

JS New Lead 95 \$97,516 - \$306,156

Monday, June 26 at 12:22 PM Janet's Opportunity Score

### Janet Seibel

Janet Seibel signed up through your Financial Planning Workshop Facebook Campaign. This is a great chance to introduce yourself.

**Email Address**  
janet.seibel@gmail.com

**Phone Number**  
973.294.2132

**Source**  
Financial Planning Workshop Facebook Campaign

🔮 **Your Next Action** > **Email Send** 🗑️

Hey Janet,

I hope you're doing well! I noticed you registered for our upcoming Financial Planning Workshop. I'll be giving you a call beforehand to see if you have any questions or need anything specifically covered at the event.

Always here to help,

Email will be sent with your default email signature.

No contact with Janet has been made yet. 🔄 📧 Send email

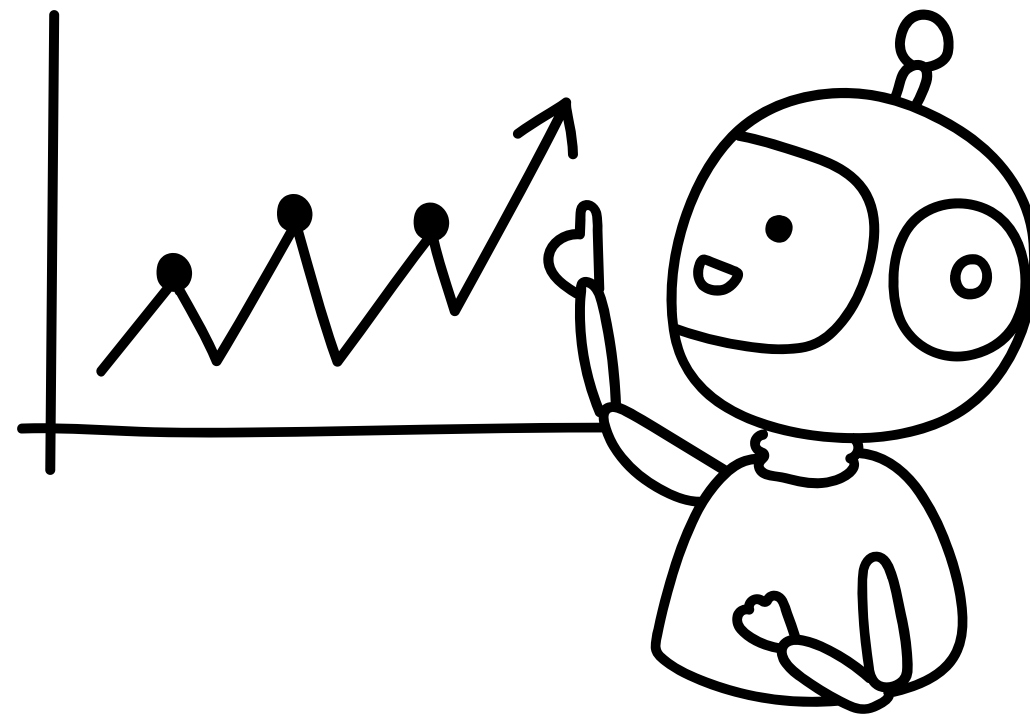
🎯 Janet's Campaigns 💬 Text Janet

# Get Started with **AI-Powered** Marketing

Generate better results with less effort

# AI in Marketing - Key Takeaways

- AI isn't a shortcut to spam - it's a tool to **build better relationships, faster.**
- When using generative AI, be **strategic** - refine and optimize your content.
- If you're not using AI, you're falling behind right now. **This is the future of advisor marketing.**





# AI-Powered Marketing & Automation

## For Financial Advisors

Ready to ramp up growth in 2025? Win more business and keep your clients engaged with Snappy Kraken's ready-to-launch campaigns and AI-powered workflows.

[snappykraken.com/ai-advisor-demo](https://snappykraken.com/ai-advisor-demo)



Book a Demo

# SCALE PREDICTABLE ORGANIC GROWTH

**AT FIRMS WITH 5+ ADVISORS**

Whether you have a growth mandate for 5 advisors or 5,000, we can help.

Schedule your demo today to see *Snappy Kraken Enterprise*

[snappykraken.com/ai-firm-demo](https://snappykraken.com/ai-firm-demo)



Book a Demo