

Press Release

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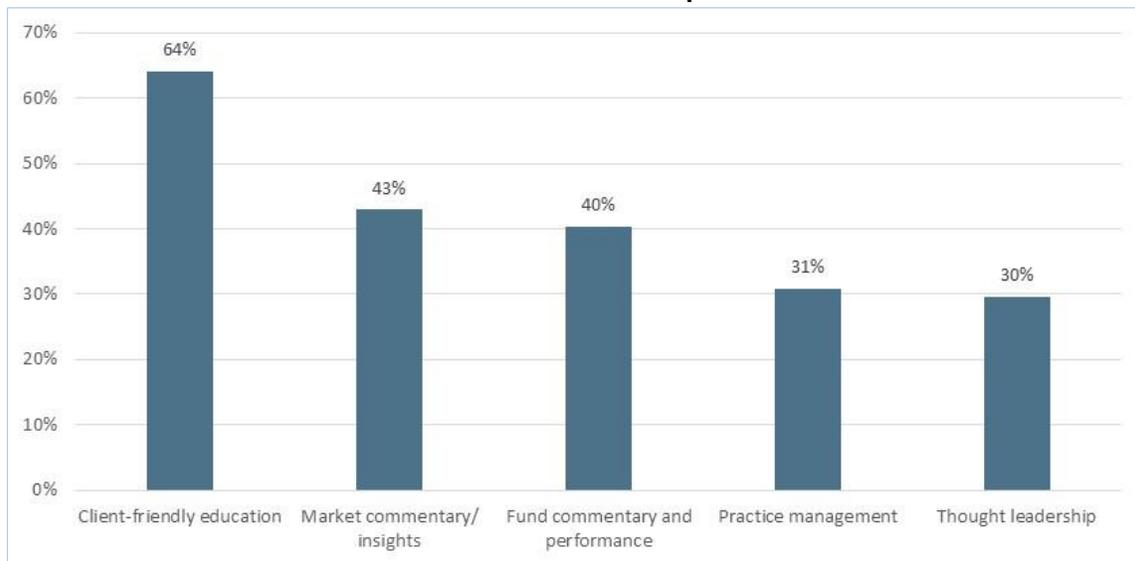
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Capture Advisors' Attention with Client-Friendly Educational Content and Remember, Less Is More

August 5, 2021, *Needham, MA* – Marketing teams at asset management firms have the ability to deliver written content to financial advisors through multiple platforms, including the firm's website, email, or even print. Although this provides a multitude of potential touchpoints, it also creates increasing competition for an advisor's attention in the overwhelming stream of targeted content. What can marketing teams do to capture an advisor's interest? Create "client-friendly educational" content and keep it brief, according to the latest findings from FUSE Research Network's Advisor Trend Monitor Series Report – *Marketing Support: The Advisor View*, published in conjunction with WealthManagement.com.

More Content Advisors Would Like from Fund Companies



Sources: FUSE Research Network, WealthManagement.com

Overall, 64% of surveyed advisors desire "client-friendly educational" content, far surpassing any of the other content categories in the survey. Regarding optimal volume of content, 58% of advisors expect blogs to be less than one page while half or more would like to see value-add content, white papers, and portfolio manager commentaries limited to two pages.

“The broad-based demand for more client-friendly education should serve as a reminder that the role of the advisor is morphing from a product selector and builder of portfolios to a trusted resource for a wide range of financial needs,” offers Patrick Newcomb, Director of BenchMark Research at FUSE Research. “Asset managers need to change their focus from promoting a product’s merits to the advisor, to providing more guidance on how a fund might serve a particular role in a portfolio crafted to match the end client’s goals.”

The Advisor Trend Monitor Report – *Marketing Support: The Advisor View* also explores valued marketing materials, touchpoints that shape an advisor’s opinion of a manager, value-add programs, digital marketing, website appeal, thought leadership rankings, among other topics. Overall data survey findings are presented with pertinent year-over-year comparisons, as well as by various advisor demographics.

The FUSE Advisor Trend Monitor is a survey-based report series that provides timely insight into advisor views on a range of issues central to asset managers’ decisions about resource allocation. With the ongoing support of our partner, WealthManagement.com, FUSE releases a total of six reports annually that comprise the Advisor Trend Monitor series.

For details about obtaining a copy of Advisor Trend Monitor – *Marketing Support: The Advisor View*, please email Jason Heinhorst at jheinhorst@fuse-research.com or call (720) 221-5223.

[About FUSE Research Network LLC](#)

FUSE was launched in 2008 with the view that research and consulting support for asset managers has failed to evolve with the changing needs of the client. The future competitive environment will demand that clients make important business decisions within shorter and shorter timeframes.

In order to support clients in this setting, FUSE provides a dynamic research platform that covers our clients’ current and future decision areas (strategic and tactical). Our goal is to become an invaluable business partner through the delivery of highly informed and forward-looking recommendations that are among the critical inputs our clients need to optimize results.

