



ADVANTUS MARKETING, LLC

ADVANCING YOUR MARKETING MOMENTUM

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Led by Tiffany Markarian, an award-winning marketing strategist, keynote speaker, and elite coach to financial services professionals, Advantus Marketing stands tall as an acclaimed marketing and management consulting firm. The firm empowers financial professionals to scale their practice and articulate their true value to clients in this competitive marketplace. Committed to excellence, the firm crafts and executes strategic business plans that fuel sustainable growth, enhance client retention and drive revenue.

For nearly three decades, exclusively in the financial services industry, Tiffany Markarian has coached thousands of financial professionals in the way they think, practice and evaluate marketing. Her influential footprint extends to being an accomplished author for esteemed financial industry publications, including *NAPFA Advisor Magazine*, *ThinkAdvisor*, *NAIFA Advisor Today*, *Advisor*

Magazine, *NAILBA Perspectives* and *Aspire Magazine*. She is a renowned keynote speaker and frequent podcast guest on how to create efficiency in an advisory practice and achieve a more powerful presence in your marketplace.

"It's one thing for financial professionals to be in the marketplace, it's another to be found," says Markarian, founder and managing director of Advantus Marketing. A new approach is crucial—a shift in the way the story is told.

Drawing from her vast experience, Markarian helps financial professionals create a vision that encompasses who they are and what they want to embody in their practices. The firm's clientele encompasses key sectors within the financial industry, including registered investment advisers (RIAs), independent broker-dealers (IBDs), insurance firms, career agencies, brokerage general agencies (BGAs), and wirehouses.

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Tiffany Markarian,
 Founder and Managing Director



Addressing Financial Professionals' Top Challenges

Effectively communicating a financial professional's value to clients in this competitive landscape presents a distinct challenge. As a result, many of them resort to random marketing strategies in search of a game-changing solution. Unfortunately, this often leads to operational confusion and unfulfilled returns on investment and effort.

Further, with the increasing prevalence of fee-only and fee-based advisory models, RIAs and advisors often rely on fee structures, fiduciary status, or portfolio management as the foundation of their value proposition. Their frequent use of technical jargon often leaves prospective clients puzzled and focused on the advisor's fee versus their value.

This is where Advantus Marketing excels. The firm adeptly redirects the focus, reshaping value propositions and messaging around the outcomes each advisor's clients want to achieve. This fosters deeper engagement and active involvement in the advisor's planning process, moving the conversation away from fixation on pricing.

"We are devoted to helping financial professionals understand the psychological needs of their prospects and clients," says Markarian. "It is imperative that advisors tap into these emotions, as financial planning is as much an emotional process as it is an economic process."

From a business development standpoint, it is no secret financial professionals can gain greater scale and efficiency by focusing on niche markets or moving up-market with their

clientele. Markarian helps advisors identify and validate the profitability of potential markets and develop relationships with centers-of-influence to gain visibility in these networks.

What Clients Say Makes Advantus Marketing Distinct

The stream of commendations flowing toward Advantus Marketing and its founder, Tiffany Markarian, stands as a testament to its capabilities.

Clients will tell you, "Tiffany brings out the necessary bits and pieces that many consultants overlook. She doesn't think like anybody else. Her growth and communication coaching has a warmth and kindness that is miles beyond the generic cookie cutter approaches all too common with professional marketing agencies."

"She is a true driver and gets the results you are looking for. You will see your entire team bond on key areas such as onboarding, marketing programs and growth. She brings a much-needed level of accountability to your business and gets to know you and your firm as a whole."

Transformational Change that Creates Lasting Impact

One of Advantus Marketing's distinctive aspects is its dedication to helping financial professionals gain scale and efficiency. Markarian reveals untapped opportunities for business expansion through meticulous analysis of each firm's internal systems, client dynamics and marketplace, equipping them with the insights needed to make informed decisions and real progress.

As Markarian states, "when coaching solo advisors or ensemble firms, it comes down to understanding their internal business models and vision, leadership personalities and capacity to execute. It requires deep assessments, one-on-one interactions with the advisors' key staff and uncovering their historical sticking points."

She further focuses on helping financial professionals right-size their service models, resulting in a tailored approach that fosters satisfaction and retention of their clients. This personalized cultivation, along with client appreciation and retention programs, establishes a long-term connection that underscores the value each advisor delivers.

Markarian's commitment to actionable outcomes is further exemplified through her results-based marketing training. Rather than simply imparting knowledge, she provides insights and proven strategies that deliver tangible outcomes.

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Nurturing growth also extends to Markarian's work in recruiting consulting and leadership development within financial institutions. She empowers financial leaders on how to recruit new experienced advisors, and develop their team's skills, so they take ownership of the firm's marketing direction. Her approach not only strengthens each organization but promotes organizational cohesion and strategic alignment.

Cultivating Success: Impactful Partnerships

Advantus Marketing's strategic prowess and adept guidance have reshaped the trajectory of numerous businesses. A notable case study Markarian worked on was a financial firm that had decent recurring revenue but stagnant growth. She employed her thorough discovery process to uncover the precise audiences and niche markets the firm's advisors should set their sights on. Within a couple of months, advisors began securing opportunities for educational presentations in their markets, amplifying their visibility.

As the collaboration progressed, Markarian refined the firm's client onboarding experience and instituted

personalized client appreciation initiatives. Within three years, the firm increased their assets under management by 54 percent, with the firm's top advisors consistently achieving growth rates ranging between 20 to 50 percent.

Similar success stories further underscore Advantus Marketing's efficacy in cultivating rapid growth. Collaborating with two insurance brokerage general agencies, Markarian provided the navigational guidance that helped them emerge as the fastest-growing agencies within their network. They achieved greater direction and clarity on serving specific sectors of the marketplace, catapulting one agency's revenue by a substantial 20 percent.

A recent case study involves a significant fee-only RIA. The firm was doing well, but the leaders noticed the closing ratios of new prospects were declining. A vital turning point emerged when Markarian addressed critical issues that plagued the firm's advisory and discovery process. Notably, the firm's advisors were not posing the right questions during initial engagement meetings, leading to stalled progress with prospects. Her strategy involved steering the advisors away from excessive service and process-centric dialogue toward more impactful approaches when engaging prospects. This shifted the narrative, allowing the firm's advisors to genuinely connect with prospects' emotional needs and encouraging them to advance through the planning process. Closing ratios immediately improved.

Accolades and Honors

In addition to being recognized as one of the Top 10 Financial Marketing Firms by *Financial Services Review Magazine*, Markarian was awarded the NAILBA Chairman's Award in 2020 by the National Association of Independent Life Brokerage Agencies. In 2019, her online course on "Client Segmentation: Identifying Opportunities in Your Book of Business" was the Top Advisor Course on The Hoopis Performance Network (HPN) University.

Company Culture

After getting to know Advantus Marketing more deeply, it is clear they are not a typical marketing agency. The company's mascot is a 1965 Seeburg jukebox that spins a massive collection of over 1,200 vinyl 45 records in the office.

Above all, collaborating with Advantus Marketing is not just a partnership, it is a transformative journey. Financial professionals who engage with Advantus Marketing are enveloped in specialized guidance that leads to heightened clarity and direction of their business, fortified relationships with clients, and a solid presence in a fiercely competitive market. **Is**

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