KEYNOTE
PRESENTATION

ADVANTUS MARKETING
ADVANCING YOUR MARKETING MOMENTUM

Elevating the Advisor Experience

Developing Advisor Loyalty and Retention

As an insurance or wealth advisory firm, your clients and advisors will have high expectations of you and your team. The challenge is developing a service model that balances the needs of your lower, less-profitable advisors while honoring and exceeding the expectations of your top advisors. Learn the critical strategies required to properly segment your advisor base, personalize and humanize the advisor experience, and set a path that moves you forward in expanding your business within other advisor markets.

You Will Learn the Best Practices for:

- *Segmenting and managing the different levels of your advisors and clients*
- *Creating an elevated service culture within your marketing and operations team*
- *Having a clear, personalized communication plan for top advisors*
- *Developing more significant relationships, loyalty and advocacy from your advisors*
- *Advisor appreciation strategies that really work*
- *Helping your team deal with a changing financial marketplace*

Suggested Presentation Time: 60 minutes

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