

## Connecting with potential clients



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## Reaching potential clients

Did you know that consumers can develop a preference for things they have been exposed to repeatedly without realizing it? This could mean the more frequently someone sees information about you and your practice, the more likely they are to become a client.

**Below are some ways you may be able to connect with clients.**



**Attend or volunteer to speak at events.** This could include meetings for local organizations such as rotary clubs or local chambers of commerce, or other events your audience may attend.



**Host an educational seminar or open house.** Invite community members to receive free financial education.



**Explore advertising opportunities.** Print ads in local newspapers or magazines, or simple paid ads on google or social media are a great place to start.



**Network with other businesses owners.** Introduce yourself and trade contact information with other local business owners.



**Sponsor a school event or community activity.** Find opportunities for your company name to be featured, such as on a 5K shirt or in the program of a school play.

## Growing your online presence

In today's digital-first world, your online presence plays a critical role in how potential clients discover, evaluate and ultimately decide to work with you. Marketing and social media don't just boost visibility — they build credibility by showing who you are and what you do.

Here are a few simple ways to reach potential clients, and establish a consistent, authentic online presence.

- 1. Plan ahead for efficiency.** Create a social media/marketing calendar to help plan and manage your content. To help save time, you may consider using a social media scheduling tool to automatically post your content.
- 2. Cater your social media practices to the generation you serve.** You may want to focus on different social media platforms depending on the audience you want to reach.
- 3. Make it personal and targeted.** Tailor your content to your target audience, so potential clients can get a better idea of who you are and what you do.
- 4. Focus on specific topics.** Focus your energy on creating content that is educational for or relatable to your audience, such as videos about financial topics or testimonies from other clients.
- 5. Engage with your audience.** Start a conversation by sharing relevant LinkedIn articles or podcast episodes or invite followers to engage with you by creating interactive content, such as polls or question and answer sessions.
- 6. Go with what's popular.** Explore what forms of content perform well with your audience. For example, video content is more successful with American consumers compared to photos.
- 7. Confirm you're compliant.** Before posting, ensure that the content you share is in compliance with FINRA requirements and other laws or regulations.

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