

Making the Break? | Hear How to Establish Your Independent Brand



For newly independent RIAs, establishing brand presence is critical to the beginning of the breakaway journey. You need to define your value proposition, identify your target audience, and determine how to reach them.

But it can be difficult to find time to dedicate to your marketing plan—and even tougher to figure out where to start.

And at the end of the day, people connect with people. Your clients and prospects want to know you. Are you secretly a fabulous cook? Do you prefer a beach vacation or hitting the ski slopes? What local charities are you involved with?

When researching for financial professionals, prospective clients are inundated with the same cookie cutter websites and cliché elevator pitches that tell them nothing about the person that they will be trusting with their finances and, more importantly, their legacy.

To help you get started on this brand journey, we've put together a host of resources to support you along the way, including guidance from like-minded advisors and expert consultants. Orion's Breakaway Resource Center is a central hub for financial advisors ready to make the next move.

You'll hear from Shannon Spotswood, President, RFG Advisory as she discusses how to develop and refine your brand, its mission, and its values to set yourself apart and attract new business.

Shannon and the RFG Advisory team have first-hand experience in the evolution of branding, not only helping advisors break away and establish their own independent brand, but also going through a rebranding process themselves

when forming RFG 2.0 a few years ago.

Part of that evolution was capitalizing on an opportunity that happened a week before the COVID-19 lockdown. RFG Advisory was hosting their annual RFG Advisor Retreat where Dom Raso, Veteran Navy Seal Team 6 Warrior and Founder/CEO of Dynamis Alliance joined as their keynote speaker. Bobby White, RFG Advisory Founder and CEO, had been training with Dom in his civilian warrior program for 4 years and knew that financial advisors would benefit greatly from Dom's inspirational and motivational sessions.

During the retreat, very impromptu, Shannon had the idea to start recording conversations between Bobby and Dom. These conversations were pure gold and later turned into a seven-part podcast series, "Become A Warrior Advisor."

The podcast series came at a pivotal time in the wealth management industry when financial advisors had to adapt to the changing realities of business caused by the pandemic. The series provides them with actionable guidance, tips and practical tools to survive and thrive during periods of uncertainty and disruption.

Connecting Bobby's own transformational journey to the transformational journey that RFG Advisory was going through as a firm, allowed him to not only share something extremely important in his life with his clients, but also provided the opportunity to connect with him on a deeper level.

Effective marketing and branding are the keys to your future growth. Building your digital presence, creating engaging content and developing your own unique brand is what sets your practice apart.

Thinking about your brand through the eyes of the consumer, key questions to ask yourself are:

- How do you want to connect and serve clients?
- How does your brand make clients and prospects feel?
- What message are you sending through your brand about your values and culture?
- Can clients and prospects find you and your firm online and through social media?

For breakaway advisors looking to develop a marketing program and create an

independent brand, technology can be a key enabler, helping with everything from prospecting to creating and distributing content. But in order to grow, advisors must not only generate new client relationships but also retain their existing clients, which requires the ability to scale their day-to-day activities. Through the support of a fully integrated technology solution, independent advisors can establish thriving, growing, practices while still maintaining an excellent client experience.

Visit our Breakaway Resource Center today to view this full presentation and more! You'll gain access to valuable insights and actionable advice from other independent advisors and industry experts who understand the process of setting out on your own.

2013-OAT-7/14/2021