

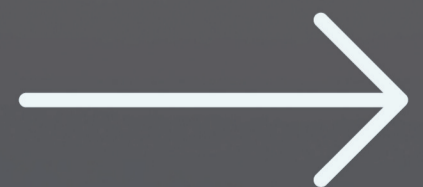


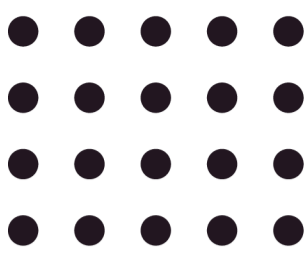
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THE AI ADVANTAGE

10 Best Practices to Drive Lead Engagement for Young Clients

As an RIA, scaling client acquisition, enhancing engagement, and optimizing operations are key to staying competitive in today's market.

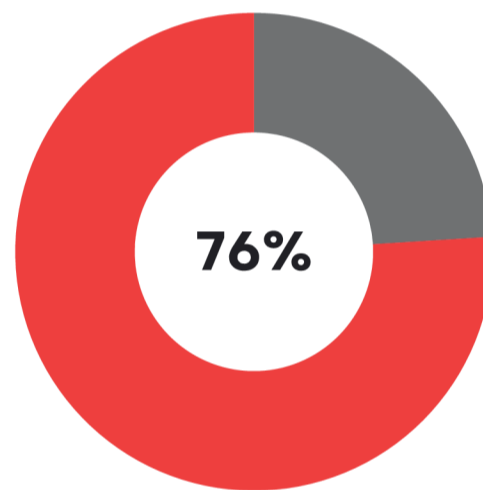




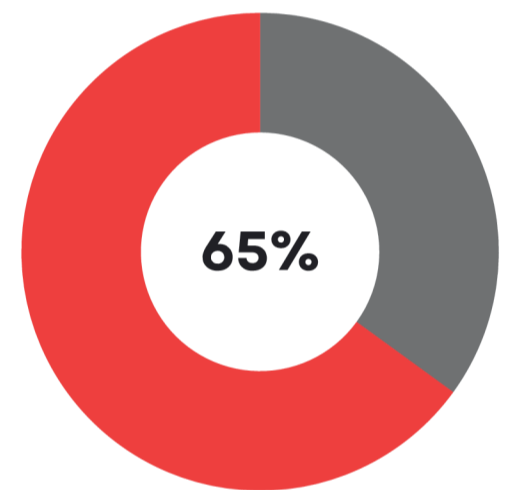
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The percentage of Americans seeking financial advice decreases with age:

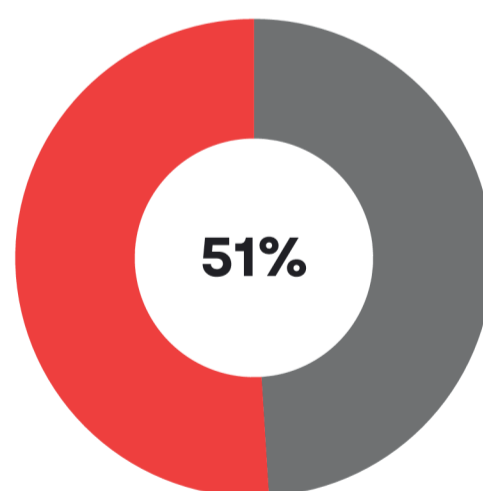
Fifty-seven percent of Americans sought financial advice in 2023, with preferences varying by age and income, according to a mid-November survey of 2,391 U.S. adults conducted by YouGov Plc for Bankrate.



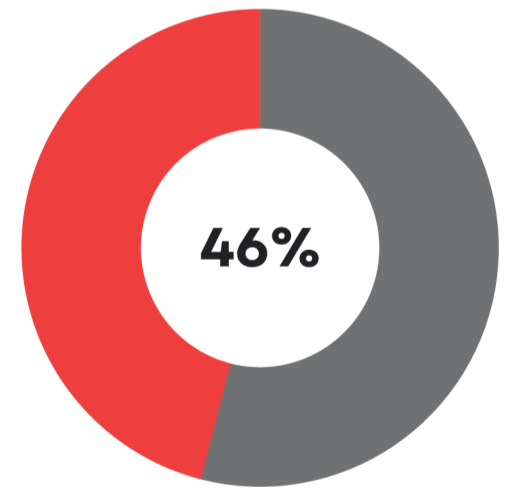
Generation Z



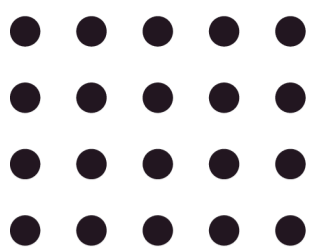
Millennials



Gen Xers



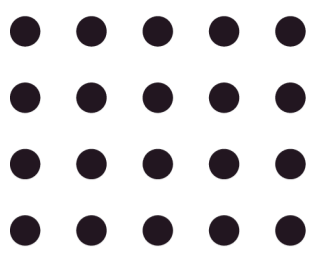
Baby Boomers



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Personalized Communication

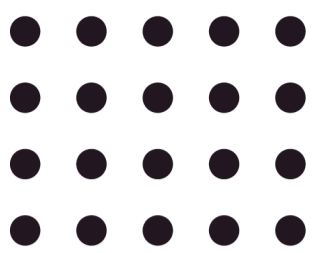
- Segment your email list based on client demographics, interests, and financial goals.
 - Craft tailored content that addresses specific needs of younger clients, such as student loan management or early career financial planning.
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Educational Content

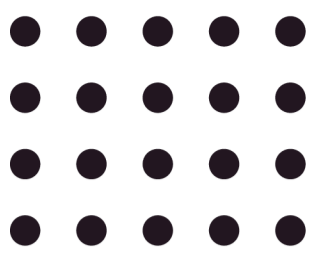
- Send regular newsletters with financial tips, market insights, and educational resources.
 - Create and share content on topics relevant to young investors, like budgeting, investing basics, and financial literacy.
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Multi-Channel Approach

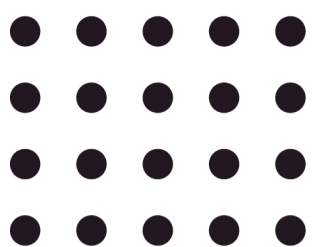
- Utilize various platforms young clients prefer, including email, social media messaging, and text messages.
 - Offer an omni-channel experience that allows seamless communication across different platforms.
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Mobile-Friendly Communication

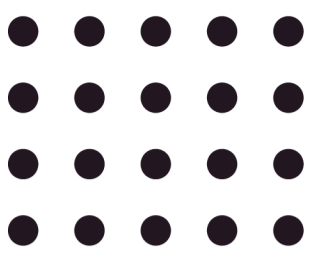
- Ensure all email communications and messaging platforms are optimized for mobile devices.
 - Use responsive design for emails to improve readability on smartphones and tablets.
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Quick Response Times

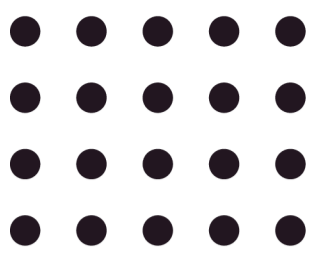
- Prioritize timely responses to messages and inquiries from young clients.
 - Consider using chatbots for immediate responses to common questions outside of business hours.
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Visual Content

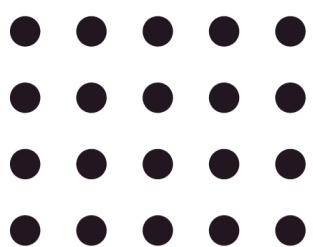
- Incorporate infographics, videos, and other visual elements in emails to increase engagement.
 - Use platforms like Instagram or TikTok for short, informative financial content.
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Automated Follow-ups

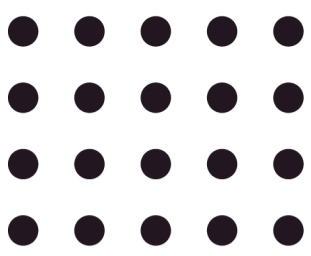
- Implement GPT-powered automated workflows for omnichannel lead nurturing, onboarding, and for following up after meetings.
 - Send reminders for important financial deadlines or check-ins.
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Transparency and Trust-Building

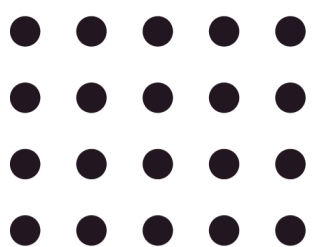
- Use email to provide clear, transparent information about fees, services, and investment performance.
 - Share personal insights or stories to build a more relatable connection with young clients.
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Interactive Tools

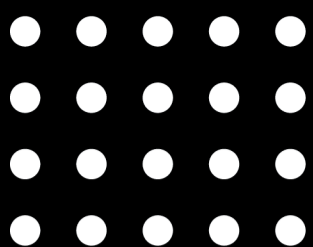
- Include links to interactive financial planning tools or calculators in your emails and SMS.
 - Offer virtual consultations or webinars through email and SMS invitations.
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Feedback and Surveys

- Regularly solicit feedback from young clients via email or SMS messaging to improve your services.
 - Use short surveys to gather insights on their financial concerns and preferences.
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DISCOVER HOW
AI CAN TRANSFORM YOUR RIA

**The AI Platform that
Systematizes Client
Acquisition for Sustainable
Growth**

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