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# DIGITAL MARKETING FOR FINANCE PROFESSIONALS

Leveraging SEO, Pay-Per-Click, and  
Advertising for Growth

# Digital Marketing for Finance Professionals: Leveraging SEO, Pay-Per-Click, and Advertising for Growth

## Chapter 1: Understanding Why Digital Marketing is Essential for Finance Professionals

These days, the financial advisor industry is in an ever-changing state of flux. Technology continues to disrupt traditional business models, consumer behaviors and preferences are evolving, and there is increasing competition from automated advisory services. In this dynamic environment, having an effective digital marketing strategy is no longer optional – it's imperative for success.

### Implemented strategically, digital marketing gives finance professionals unparalleled opportunities to:

- **Reach a Broader Audience:** Digital channels allow you to connect with prospects and clients across multiple platforms at scale. You can precisely target customers by location, interests, financial needs, and more.
- **Build Your Brand and Establish Trust:** Consistently delivering value through content builds brand awareness and trust among prospects. Digital platforms allow you to position your expertise.
- **Generate Qualified Leads:** Digital marketing provides data-driven insights into what content and messaging resonates best with your audience to generate more qualified leads.
- **Enhance Client Relationships:** Communicating regularly via email, and social media and using client portals/apps fosters lasting client relationships.
- **Gain a Competitive Edge:** Those leveraging digital marketing effectively can differentiate themselves and move ahead of the competition. Without it, you risk losing visibility and clients.

### THE POWER OF DIGITAL MARKETING

Digital marketing encompasses everything from search engine optimization (SEO) and pay-per-click (PPC) advertising to social media marketing, content marketing, email marketing, and more.

Mobile searches for financial planning and management **grew 70%** just in two years.

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47% OF BUYERS ENGAGE WITH 3-5 CONTENT PIECES BEFORE CONTACTING SALES.

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## The Risks of Avoiding Digital Marketing

While transitioning to digital channels necessitates some effort, the risks of avoiding digital marketing outweigh the required investment of resources. Failing to have an online presence and digital strategy will:

- **Reduce discoverability:** You may be invisible to the 80%+ of investors and prospects searching online for financial advisors and resources.
- **Limit growth potential:** Digital channels provide scalable ways to organically grow your client base through branded content and other tactics. Avoiding digital restricts your reach.
- **Hamper targeting capabilities:** You miss out on data-driven insights to segment and personalize messaging to best resonate with each customer.
- **Weaken client relationships:** Mobile usage and reliance on digital services continue increasing. Failing to effectively support and engage clients across platforms damages relationships.

## The Unavoidable Requirement for Financial Professionals

Digital marketing is now essential for financial professionals and firms to build sustainable success in an increasingly competitive landscape. It offers unrivaled capabilities to cost-effectively reach more qualified prospects, convert them to clients, retain long-term relationships, and gain an edge over the competition. The risks of avoiding digital solutions are now too significant. Firms that embrace digital marketing will inevitably pull ahead of their peers

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# Chapter 2: Search Engine Optimization (SEO) for Finance Professionals

SEO is the process of improving a website's visibility in organic search engine results. When done effectively, it leads to more qualified traffic to your website and more exposure for your brand. SEO is hugely impactful for finance brands today, given that research indicates over 80% of people searching for financial advisors now use Google and other search engines to find options. Let's explore what SEO entails and how financial professionals can use it to excel in the competitive digital landscape.

## What is SEO and Why It Matters

In simple terms, SEO aims to help your website rank higher in search engines when prospects search for relevant keywords tied to your offerings. The higher the rankings, the more visibility your content gets in results. This increases your website's traffic, leads generated, and brand awareness over time.

## Here are some of the main benefits financial professionals see from SEO:

- **Increased website traffic:** Ranking for industry keywords drives qualified visitors.
- **Heightened brand visibility:** Appearing in search results expands awareness.
- **More lead generation:** Optimized content attracts and converts more prospects.
- **Promotes trust and authority:** Ranking high instills confidence in your expertise.
- **Significant ROI:** SEO delivers results without ongoing advertising costs.

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ORGANIC SEARCH  
DRIVES 64% OF CALLS  
TO FINANCIAL  
SERVICES, PAID  
SEARCH 36%

**Appearing prominently in organic search is hugely valuable for financial firms aiming to sustainably grow their business in today's market.**

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## Key SEO Strategies for Finance Brands

Capturing the above benefits requires financial services brands to focus on core SEO best practices tailored to the industry, including:

- **Performing keyword research:** Identify high-value, search query prospect-use related to offerings. Target informational, long-tail keywords with relevant pages using strategic keyword placement to drive organic traffic.
- **Create useful, unique content:** Develop blogs, videos, tools, and other content tailored to ranking for your focus keywords. Ensure all materials provide value - 59% of decision-makers trust thought leadership content more when evaluating companies.
- **Optimize for local SEO:** Rank for location-based searches by completely developing your Google My Business page and other local listings.
- **Enhance technical website elements:** Ensure your website has secure hosting, fast page speeds, responsive design, XML sitemaps, and more for search engine crawling.
- **Build authoritative backlinks:** Earn high-quality external website links pointing back to your content to signal expertise.
- **Track analytics:** Use data to refine your SEO tactics for maximum ROI. Monitor rankings and traffic.

**Executing SEO effectively requires significant expertise and the use of analytics. For long-term growth, financial professionals should view SEO as an ongoing strategy central to overall digital marketing success.**

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# Chapter 3: Pay-Per-Click (PPC) Advertising for Finance Professionals

Pay-per-click (PPC) advertising refers to sponsored listings displayed by search engines like Google and Bing when specific keywords are searched. It's a model where advertisers only pay when their ad is clicked. Implemented strategically, PPC delivers significant advantages to financial services brands.

Financial services keywords in Google and Microsoft Ads can exceed \$50 per click - this highlights the high lifetime value of every customer coming from this channel.

## Introduction to PPC Advertising

With PPC campaigns, ads can be precisely targeted to appear for industry-specific keywords prospects may search when looking for financial guidance or products. For example, a financial advisor can create PPC ads to appear when someone searches "retirement planning Austin, TX".

## The main benefits that PPC provides for finance companies include:

- **Increased immediate visibility:** PPC ads appear instantly, allowing you to capture traffic the same day with no need to wait for organic rankings.
- **Precisely targeted ads:** Show your ads exclusively to your ideal audiences based on keyword selection.
- **Measurable ROI:** See exactly how much you're spending and the revenue driven by those ads, with the ability to refine your tactics for the best ROI based on the data.
- **Flexibility:** Launch new campaigns rapidly and pause or adjust existing ones based on performance.

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Only 25% of banks measure marketing ROI - financial services providers have the opportunity to gain more insights and use that data.

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## Crafting Effective PPC Campaigns

Well-optimized PPC campaigns don't happen by chance. For successful ones, financial brands need to focus on:

- **Extensive keyword research:** Identify the terminology your audience uses and group it into tightly themed ad groups around services (ex. wealth management, retirement planning, investing). Analyze the search volume and competition data to inform bids.
- **Highly relevant ad copy:** Ensure your headline, description, and display URL speak directly to the user's intent behind searched keywords by using emotional triggers and concrete benefit-oriented messaging.
- **Optimized landing pages:** Send traffic to dedicated pages reflecting the terminology used in your ads to offer relevant content and clear calls-to-action to convert visitors.
- **Conversion tracking:** Install tracking pixels on key pages to attribute leads and sales generated by your ads. Refine campaign elements based on the performance data.

**A strategic, analytics-driven approach to PPC allows financial services providers to scale growth in a targeted, cost-efficient manner. The combination of precise audience segmentation and complete visibility into spending makes it an indispensable digital marketing channel.**

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# Chapter 4: Leveraging Digital Advertising Services as a Finance Professional

Beyond search engine marketing through SEO and PPC, financial professionals have an extensive range of digital advertising tactics they can leverage to raise awareness, engage customers, and drive growth for their firm or practice.

## The Spectrum of Digital Advertising Options

- **Display Advertising**

Banner ads displayed on third-party websites and apps represent the most common form of display advertising. Ad placement can be tailored based on parameters like user demographics, interests, browsing habits, and intent signals. For example, a financial advisor can choose to show highly-targeted banner ads only to users in a specific city who have recently read online content about retirement planning.

- **Social Media Advertising**

With platforms like Facebook, Instagram, LinkedIn, and Twitter, brands can create and run social media ad campaigns micro-targeting unique characteristics of their ideal customers. Sponsored posts and social ads also benefit from the surrounding context - they appear in environments where users are already actively engaged. For a wealth management firm, running an Instagram ad showcasing expertise exclusively to followers of investing-related accounts can yield better engagement.

- **Retargeting**

Retargeting or remarketing involves showing customized ads across sites to prospects who have previously visited your website. For instance, anyone who accesses a financial advisor's website and reads about college savings plans can later be served tailored ads on preparing for education costs when browsing elsewhere online. This reminds them of offerings and brings them back to the site to convert.

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## Benefits of Digital Advertising for Finance Brands

Some major advantages finance brands can realize through these digital advertising tactics include:

- **Expanded reach and awareness:** Advertising supplements SEO/PPC efforts to get your brand seen by more of your target demographic where they are actively spending time online.
- **Improved conversion rates:** Users who view and click on your ads have essentially raised their hands as being interested, and retargeting them later further raises conversions.
- **Powerful audience segmentation capabilities:** Digital ads allow for superior levels of personalization through data like intent, purchase history, age, income level, and countless other signals.
- **Trust building:** In the finance industry, consumers put their confidence in established respectable providers. Strategic digital ads that instill professionalism and transparency promote consumer trust.

## Best Practices for Effective Digital Advertising

Of course, achieving a positive ROI requires following the essential best practices such as:

- Setting concrete campaign goals and metrics before launching digital advertising campaigns based on your overall business objectives. Continually optimize towards these KPIs.
- Algorithmic bidding models considering historical performance data generally outperform manually fixed bids. Capitalize on built-in automation.
- Always directing traffic to a dedicated, customized landing page reflecting the messaging and flow of your ads, which dramatically improves conversions compared to sending traffic to the homepage.
- For retargeting, initially show branding/awareness messaging before switching to more direct-response, conversion-focused ads as they continue engaging.

**With the ability to track engagement and continuously evolve elements like creative and audience targeting mid-flight, digital advertising empowers financial professionals and firms to nimbly respond to performance and effectively grow their visibility.**

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# Chapter 5: Why Hire a Professional Digital Marketing Company

While free online tools and self-service platforms make it possible to execute digital marketing without outside help, partnering with an experienced digital marketing agency brings immense advantages for financial advisors and financial service providers seeking to grow their businesses.

## Expertise and Experience Make a Difference

Digital marketing encompasses a complex array of moving parts across several channels such as analyzing performance data, running testing iterations, and continuously optimizing campaigns. Developing and executing an effective integrated strategy requires significant specialized expertise.

As we covered in Chapter 1, Waters Communication has over 20 years of experience specifically helping financial clients succeed through marketing and campaign development. We've run successful digital marketing for companies ranging from Fortune 500 brands to small local practices. The depth of know-how to quickly leverage digital's potential for the finance sector can provide a key competitive advantage.

## Curated Strategies Aligned to Your Goals as a Financial Professional

Given our extensive background in financial services, Waters Communication develops completely customized digital marketing roadmaps tailored to your distinct objectives around lead generation, brand building, or engagement rather than taking a one-size-fits-all approach. Our team keeps up-to-date on the latest trends in digital marketing for finance as part of curating what will work best for driving your specific KPIs.

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## Continually Optimizing for Maximum ROI

We recognize the value of continually monitoring performance and evolving strategies based on insights. Our comprehensive analytics dashboard paired with regular optimization of elements like audience targeting and messaging allows us to ensure your budgets are being allocated to the highest-performing platforms and campaigns. This data-centered focus on optimization drives superior ROI.

## Accelerate Your Digital Marketing Success with Waters Communication

We hope this eBook has outlined how critically important digital marketing across SEO, PPC, paid advertising, and other channels now is for financial professionals and firms to sustainably grow and remain competitive.

Executing an integrated digital strategy requires significant expertise - whether around analytics-based campaign optimization, staying on top of algorithm changes, leveraging automation effectively, or aligning efforts to your overarching business goals.

At Waters Communication, our passion for unlocking digital marketing's immense potential to solve problems has repeatedly delivered standout outcomes for financial brands. Our customized strategies, constant optimization mindset and focus on measurable ROI have helped clients rapidly boost lead volumes, increase visibility among ideal prospective customers, and strengthen engagement with existing ones.

We invite you to connect with our team of marketing experts to explore developing a 360-degree digital marketing roadmap tailored perfectly to help you achieve your individual business goals.

Request A Free  
Digital Marketing  
Consultation

- Our no-obligation consultation evaluates your existing digital presence.
  - Identifies opportunities to leverage digital marketing more effectively.
  - Provides actionable recommendations to accelerate online growth. We welcome the opportunity to harness our 20+ years of specialized expertise in digital marketing for financial services providers to drive transformative outcomes for their businesses.
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