



Financial Email Marketing Portfolio



Dear Advisor:

Robo-advisors are threatening to take billions of dollars from experienced advisors like you. How can you fight back and acquire the clients and assets you deserve?

By partnering with an experienced and trustworthy turn-key asset management program provider (TAMP).

TAMPs let you outsource time-consuming and increasingly commoditized daily investment management activities to teams of highly experienced investment researchers, analysts and portfolio managers with proven track records.

With a TAMP working in the background, you'll have more time to be front and center with your clients, delivering the highly personalized financial planning services and attention that robos can never match.

Which TAMP is right for your firm? Find out downloading a complimentary copy of *America's Best TAMPs*.

[DOWNLOAD NOW](#)

Only in 2018 *America's Best TAMPs* will you get a complete listing of the top players in the TAMP industry.



APViewpoint presents: Mutual funds versus ETFs: Which are better for your clients?

Sponsored by:



Thursday, February 23, 4:15 pm ET
Eligible for one CFP Board® CE credit and one IMCA® CE credit

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Over the past decade, assets invested in ETFs have grown by 746% compared to 88% for mutual funds(1), as many investors and advisors now consider ETFs to be a viable alternative. In this presentation, Steven Vannelli will use Morningstar's recent decision to merge ETFs and mutual funds into the same peer group as a starting point for analyzing the similarities—and differences—between these two options. Advisors will learn:

- The key questions to ask about the pricing, performance, expense ratios and tax impact of mutual funds and ETFs.
- Why mutual funds and ETFs with a similar focus, such as those targeting specific geographical regions, may deliver significantly different results, and
- How to effectively educate clients on the potential benefits and risks of ETFs.

Steven will answer attendees' questions during the webinar and will be available to continue the discussion on APViewpoint.

[Learn More](#)

Presenter:



Steven Vannelli, CFP®
CEO/CIO
Gavekal Capital



What do Advisors-and their Clients-Really Want?

A complimentary advisor research infographic

What are advisors' most significant business challenges?
What are their clients' most pressing financial concerns?
Which adviser offers do advisors value most?

Find the answers to these and other questions by getting our new *Advisor Perspectives* infographic. Surveying the Concerns and Needs of Advisors—and their Clients. Request your copy of this free research by sending an email to thoughtleadership@advisorperspectives.com.

ONLY 10% OF CLIENTS ARE CONCERNED ABOUT REPLACING POORLY PERFORMING INVESTMENTS

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Briskin Consulting

www.jeffbriskin.net

jeffbriskin@hotmail.com

508.934.6252

Online Seminar Email

Subject line: **Webinar – Steve Oshins’ Trust-Worthy Insights on DAPTs**



PRESENTER:



Steven J. Oshins, Esq.,
AEP

Oshins & Associates, LLC

The Hybrid Domestic Asset Protection Trust: A Third-Party Trust That Can Turn Into a Self-Settled Trust

A One-Hour Webinar Presentation

Get unlimited access to this valuable estate planning webinar presented by Steve Oshins, Best Lawyers® 2018 Trusts & Estates Lawyer of the Year.

Register Now

Protecting your clients' assets from taxes and creditors is a critical component of estate planning. For this purpose, many estate planners recommend the use of a Domestic Asset Protection Trust (DAPT) or Foreign Asset Protection Trust (FAPT).

But neither option guarantees protection from creditors. And settlers who aren't beneficiaries can't easily gain access to Trust assets.

Nationally recognized Trusts and Estates attorney Steve Oshins believes there's a better choice—the Hybrid DAPT. In this recording of a webinar he originally presented on August 11, 2017, Steve explains:

- The pros and cons of regular DAPTs and FAPTs, including situations where they may not offer insulation from creditors;
- Why Hybrid DAPTs provide the protection and estate tax benefits of regular DAPTs while offering multiple ways for settlers to access Trust assets;

Advisory Firm Client Newsletter

Subject line: **September 2018 Newsletter – Avoiding Online Scams**



FINANCIAL GUIDANCE
FOR EVERY STAGE OF LIFE.

September 2018 Newsletter

Separating Fact from Fiction

The mid-term election cycle has kicked off, and over the next six weeks voters can expect an onslaught of promises, claims, and counter-claims that will make it difficult to separate political truth from fiction. Investment markets, however, tend to react mainly to the economic facts on the ground. Investors are weighing the positive aspects of strong results in the manufacturing sector and high levels of consumer confidence with uncertainty over the outcome of foreign trade talks and recent sell-offs in the technology sector.

As we move into the thick of election season, expect periods of volatility as investors express their opinions on which party will gain or retain control of Congress and the potential ramifications. As always, if you have any concerns about how these political or economic factors may affect your portfolio, please feel free to [contact us](#).

Charitable Giving and the New Tax Laws

by Canby Financial Advisors

For many people, the Tax Cuts and Jobs Act of 2017 offers incentives to increase their annual donations. [Learn more.](#)

Avoiding Six Common Socially Engineered Scams

Posted by Chris Gullotti, CFP®

How to protect yourself against online criminals who prey on people's emotions. [Learn more.](#)

RMD or Not RMD? These are the Questions

Posted by Joelle Spear, CFP®

With many retirees owning a mix of 401(k), 403(b),
Tax-deferred Roth, SIMPLE, and SEP IRA accounts, figuring



Forward

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**As always, please
feel free to contact
us with any
questions.**

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bottom of this email.

Website Re-launch Email

Subject line: **Introducing the new and improved Advisor Perspectives**



Helping advisors enable clients to achieve their financial goals

Discover the New
and Improved
Advisor Perspectives



If you haven't been to [Advisor Perspectives](http://www.advisorperspectives.com) lately, it's time to take another look. We've just launched our completely redesigned web site and e-Newsletters to create an optimal environment for both our readers and advertisers.

- Want a deeper dive into what we've done and why? [Get the full story](#) from *Advisor Perspectives* CEO Bob Huebscher.
- Want a guided tour of our new web site and enhanced advertising opportunities? [Contact us](#) today!

CONTACT US

www.advisorperspectives.com

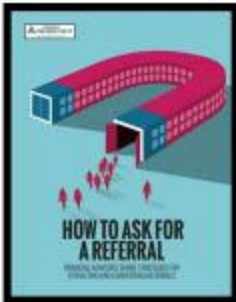
Content Marketing Offer Email

Subject line: **How Successful Advisors Get More Referrals**

MAKE THE MOST OF YOUR #1 SOURCE OF NEW ASSETS

Explore proven strategies for generating and converting more referrals

▶ DOWNLOAD OUR NEW WHITEPAPER



Dear Advisor:

Even in this digital age, 92% of advisors still consider referrals from friends, families, centers of influence (COIs) and professional networks to be their most important source of new clients.*

If you are not getting as many quality referrals as you would like, or you are looking new ways to convert more referrals into clients, [download our complimentary new whitepaper, How to Ask for a Referral](#)

This must-read business-development whitepaper reveals unique referral strategies successful advisors are using to fill their pipelines with affluent clients and convert more prospects to clients. You will learn:

- Why marketing your most profitable specialty areas is more effective at generating leads than a generalist approach;
- How repeatedly solving complex financial problems for clients will encourage them to recommend you to friends and family with similar challenges;
- The proper ways to ask a client for a referral—and how to follow up;
- Which COIs are your best source for wealthy women referrals;
- How to use content marketing and social media to build awareness among hard-to-reach millennials; and
- How to leverage professional networking groups to build rewarding referral relationships.

This whitepaper may be the most important business development tool you will use all year. Give your own referral program a boost by [downloading it today](#).

[DOWNLOAD NOW](#)

*Source: Financial Services Marketing Benchmarks 2017, Outbound Engine

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Webinar Promotion Email

Subject line: **CE webinar – Why ETFs could be better for your clients**



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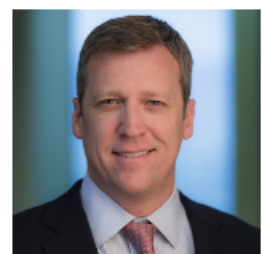
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Presenter:



Steven Vannelli, CFA
CEO/CIO
Gavekal Capital

[Learn More](#)

Research Offer Email

Subject line: **What you need to know about financial advisors**



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A complimentary advisor research infographic

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What are their clients' most pressing financial concerns?
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POORLY PERFORMING
INVESTMENTS**

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Whitepaper Offer Email

Subject line: **How today's top TAMPs can help you beat the robos**

BEAT THE ROBOS AND GAIN MILLIONS IN AUM

Learn how TAMPs can help you
land more affluent clients

▶ DOWNLOAD OUR COMPLIMENTARY GUIDE



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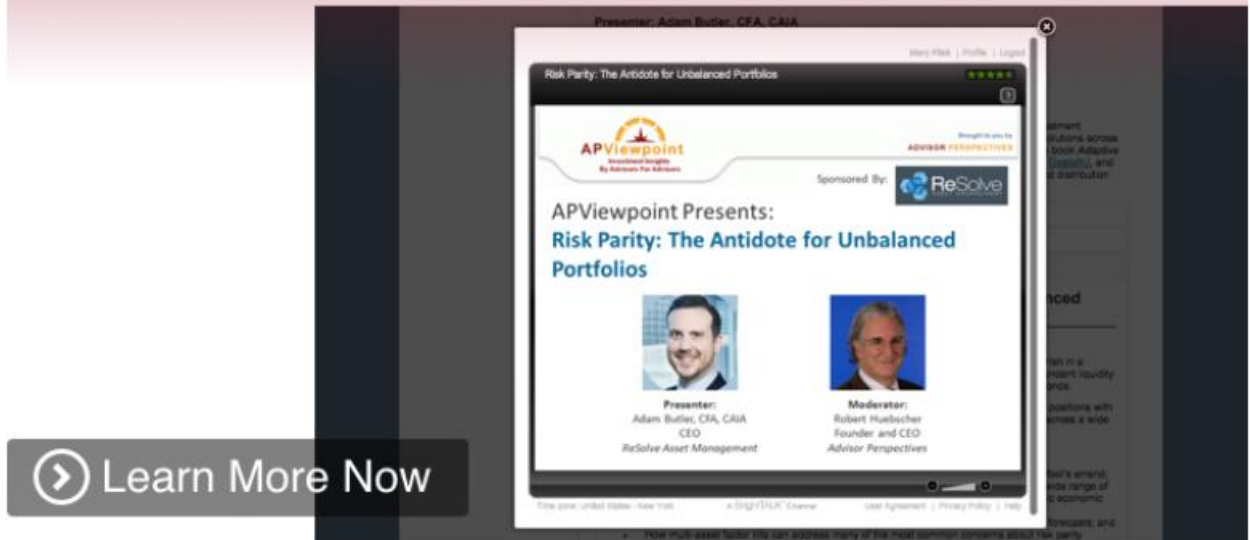
DOWNLOAD NOW

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Webinar Case Study Email

Subject line: **Case study – A successful, effective lead generator**

Maximize Your Webinar Results



Webinars: A Cost-Effective Lead Generator

Learn how one small global asset management firm leveraged the power and reach of **Advisor Perspectives webinars** to build awareness of its brand and capabilities and generate hundreds of qualified advisor leads.

- [View the case study on Advisor Perspectives.](#)
- [Download](#) an overview of our webinar production and marketing services.
- [Contact us](#) to learn more about our webinar services.

Press Release Email

Subject line: **APViewpoint reaches its 10,000 member milestone**



ACTIONABLE ADVICE FOR FINANCIAL ADVISORS: Newsletters and Databases Focused on Investment Strategy

Contact: Jeff Briskin, Director of Marketing
Company: Advisor Perspectives
Phone #: 508-934-6252
Email: jbriskin@advisorperspectives.com

FOR IMMEDIATE RELEASE

March 4, 2016

PRESS RELEASE

APViewpoint Reaches the 10,000-Member Milestone

- **The largest advisor-only community**
- **The premier forum for sophisticated discussions of investments, financial planning, and practice management**
- **Membership includes 60 industry thought leaders**

BOSTON, MA. March 4, 2016. Advisor Perspectives is pleased to announce that on February 22, 2016, APViewpoint (www.apviewpoint.com) enrolled its 10,000th member, a significant milestone which reinforces its standing as the largest online community for financial advisors.

Since its launching in May, 2014, APViewpoint has become the industry-recognized forum where advisors can share insights and discuss issues of vital importance to their profession with their peers and 60 nationally recognized thought leaders. This impressive roster of thought leaders includes Bob Veres, Wade Pfau, Michael Kitces, Larry Swedroe, Harold Evensky, Charlotte Beyer, Michael Edesess, Dan Solin, David Blanchett, Ron Rhoades, Joe Tomlinson and Deborah Fox.

"We are exceptionally thankful for the widespread adoption APViewpoint has achieved among advisors," said Bob Huebscher, founder and CEO of Advisor Perspectives. "But we are even more pleased by the degree to which APViewpoint has advanced the advisory profession, by providing a forum for thoughtful discussions about the most important topics and challenges facing wealth managers and financial planners."

APViewpoint's members and thought leaders value the ability to share their own knowledge and learn from their peers and other advisors.

"APViewpoint is becoming a hub of thought leadership on the most important topics in the financial planning/investment advisor profession. I've been encouraging my *Inside Information* readers to discuss my articles on APViewpoint, where I can watch the advisor community interact and evolve the conversation to places I wouldn't have gotten to on my own," said Bob Veres, editor and publisher of *Inside Information*.

"The quality of the discussions on APViewpoint is higher than on other industry sites, and I've benefited and learned both from participants' insights and from being forced to justify my positions based on the data and research as well as logic," said Larry Swedroe, head of research for Buckingham Asset Management and author of *The Incredible Shrinking Alpha*.

"Participation in the APViewpoint community has been extremely rewarding for me. It allows me to engage in discussions and ask questions about the topics that are of the most interest to me. I love the openness of the debates," said Scott MacKillop, CEO of First Ascent Asset Management.

Content Placement Product Email

Subject line: **Give 330,000 advisors access to your unique perspectives**



Advisor Perspectives Market Outlook Promotion & Placement: The most effective way to share *your* unique perspective

With **Advisor Perspectives Market Outlook Placement and Promotion** service, you can give more than 300,000 advisors access to your firm's unique views and analysis.

- Your quarterly, semi-annual or annual market outlooks will be permanently accessible as content on our website;
- We'll aggressively promote your commentary on our home page and in a special Market Outlook area of our site; and
- We'll maximize exposure by promoting your content to more than 330,000 advisors via a special quarterly Market Outlook edition of our *Research Perspectives* e-Newsletter.

To learn more:

- Download our [Market Outlook Promotion and Placement Overview](#).
- Our next Market Outlook promotional opportunity will take place mid-April. To learn more about this service [contact us](#) today at sales@advisorperspectives.com

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Special e-Newsletter



Sample Market Outlook with 100% share-of-voice banners