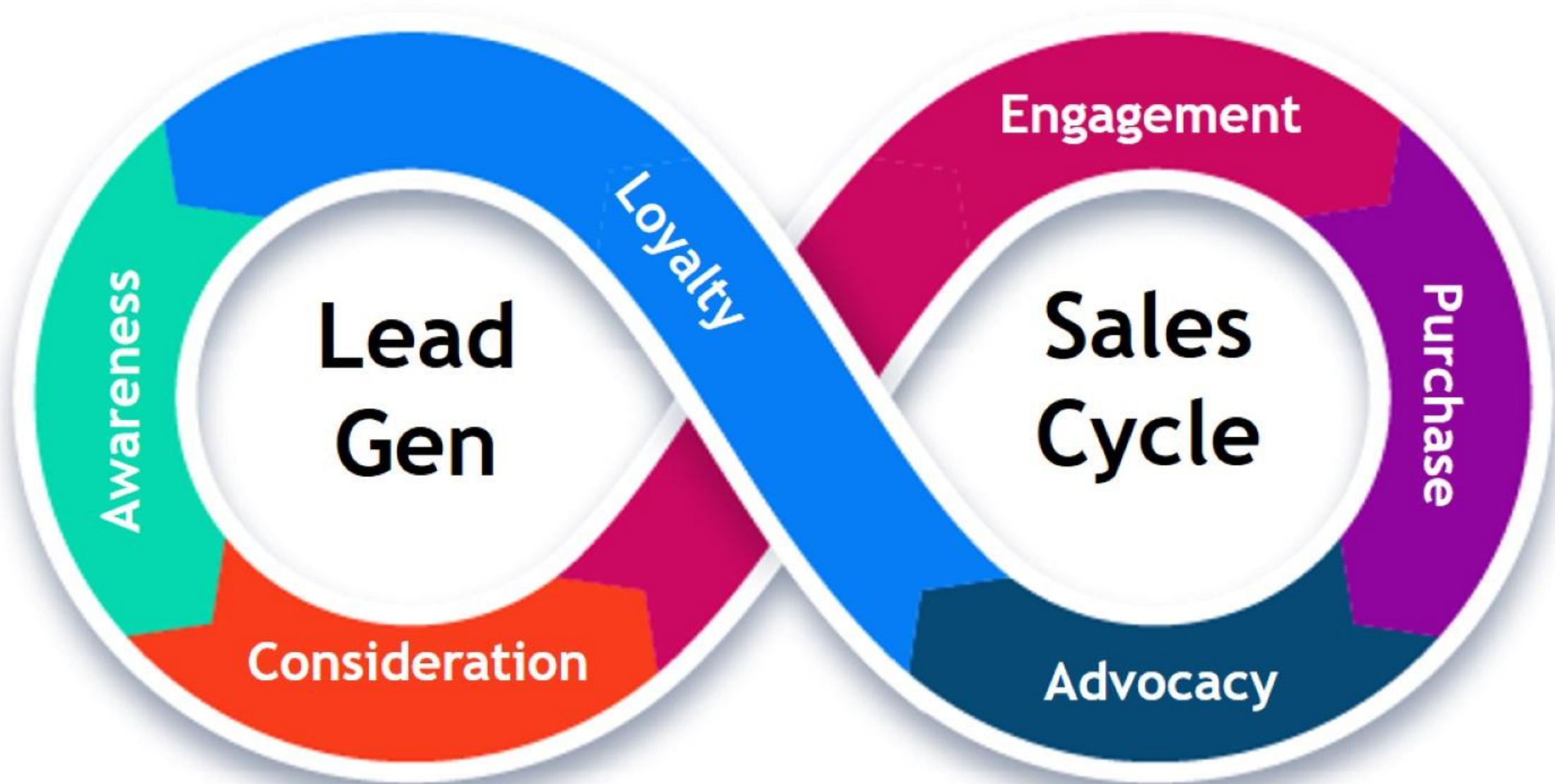


Latest Trends in Digital Marketing for Retirement Plan Advisors



Jesse Taylor

Senior Vice President, Business Development



1. Awareness

- Email
- Social Media
- Paid Ads
- SEO

2. Consideration

- Webinars
- Website
- Landing Pages
- Content

6. Loyalty

- Client retention
- Receptive to new ideas

3. Engagement

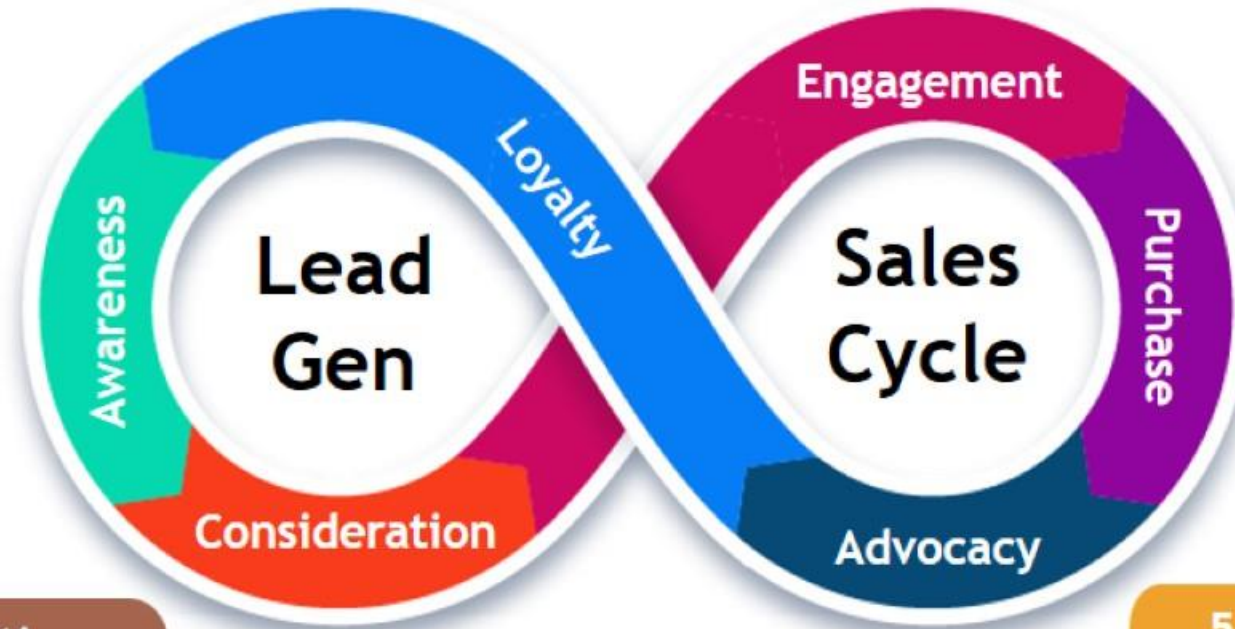
- Email Sequences
- Discovery Calls

4. Purchase

- Finals Meeting
- Proposal
- Contract

5. Advocacy

- Onboarding
- Conferences
- Support Team
- Webinars

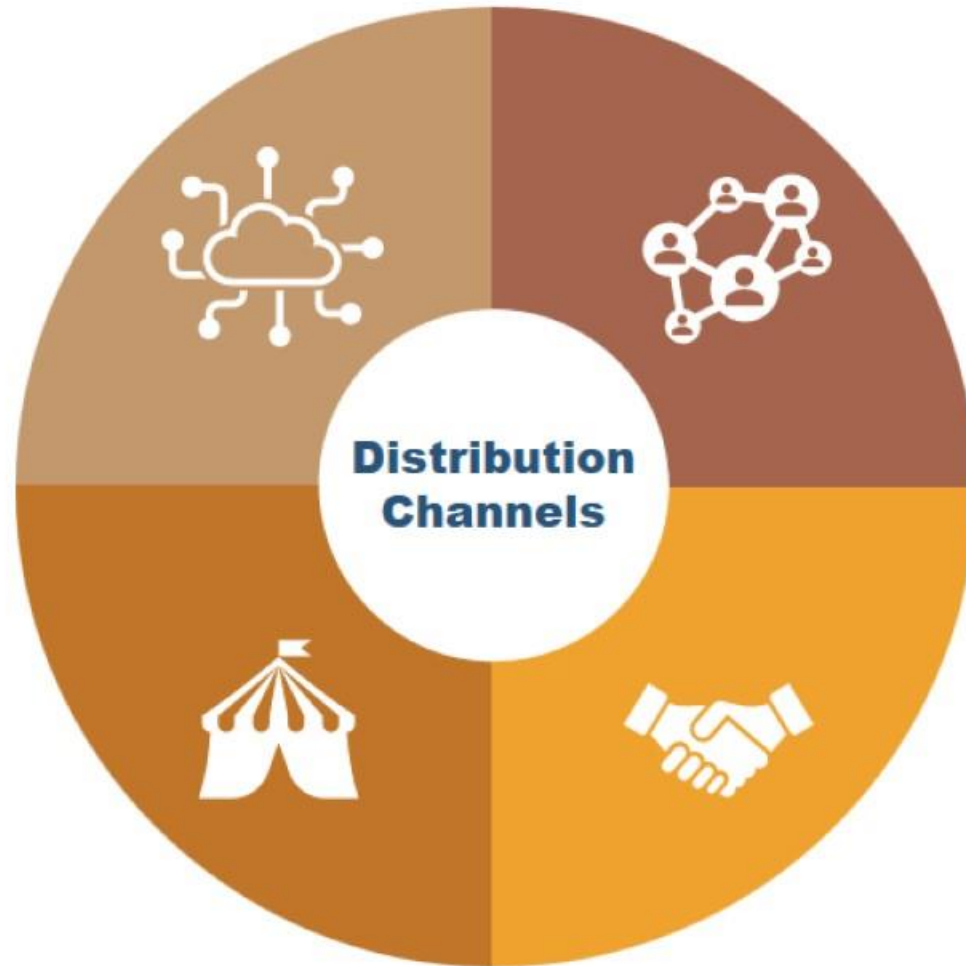


Digital

- Social Media
- Paid Ads
- SEO
- Website

Events

- Webinars
- Seminars
- Tradeshows
- Client Events



COI

- RK / DCIO
- CPAs
- Benefits Brokers
- Referrals

Direct

- Email Blasts
- Cold Calls
- Cold Emails

ICEBREAKER

1. Who has their **phone** near them?



ICEBREAKER

2. Are you on LinkedIn?

THE DIGITAL VERSION OF YOU



Have a great profile
to stand out.



Grab your
smartphone.



Make your profile
amazing.

- Optimized for phones
- Banner image
- Biography summary

ICEBREAKER

3. How is your **website** experience?

Website Fundamentals

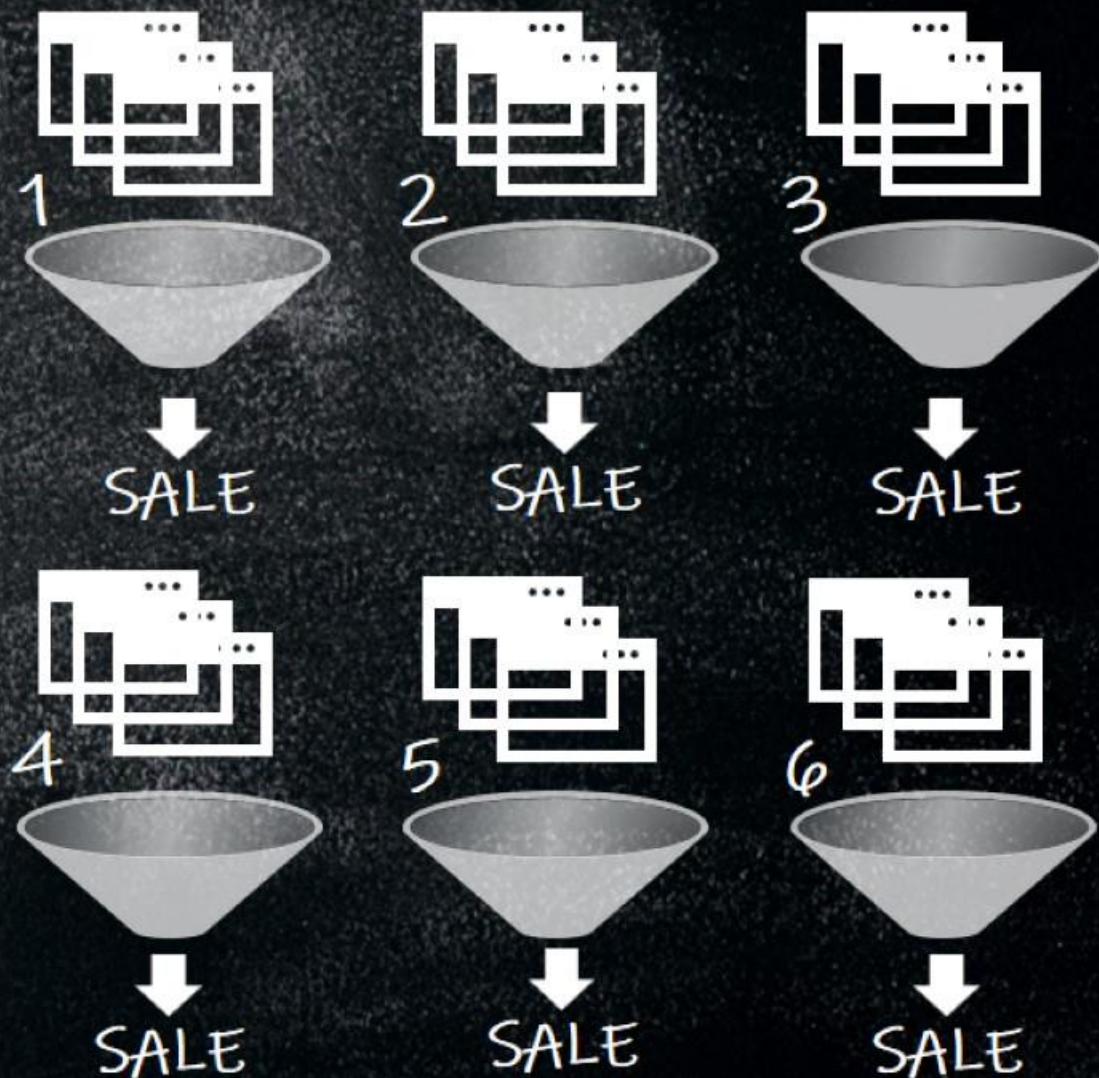
OLD WEBSITE STRUCTURE



Book / Contact



NEW WEBSITE STRUCTURE



**Do You Know if it's
Set Up Right?**



9 out of 10 people will look you up
in advance of accepting a meeting

Having a strong digital presence makes
you findable, credible, and helps you
attracts new business.

CONTENT DISTRIBUTION

Investing in Digital Business Development Strategies



Content communicating across the generations



Boomers

PREFERRED MARKETING

- ✓ Referrals
- ✓ Cold Calls
- ✓ Live Events
- ✓ **Newsletters**

AGES 77 - 59



Gen X

PREFERRED MARKETING

- ✓ Referrals
- ✓ **Social Media**
- ✓ **Email Campaigns**
- ✓ Live Events
- ✓ **Webinars**
- ✓ Podcasts
- ✓ **Newsletters**
- ✓ **Internet Research**

AGES 58 - 43



Gen Y Millennials

PREFERRED MARKETING

- ✓ Referrals
- ✓ **Social Media**
- ✓ **Email Campaigns**
- ✓ Live Events
- ✓ **Webinars**
- ✓ Podcasts
- ✓ **Internet Research**

AGES 42 - 27



Gen Z

PREFERRED MARKETING

- ✓ Referrals
- ✓ **Social Media**
- ✓ **Webinars**
- ✓ Podcasts
- ✓ **Internet Research**

AGES 26 - 11

Today's labor market across the generations

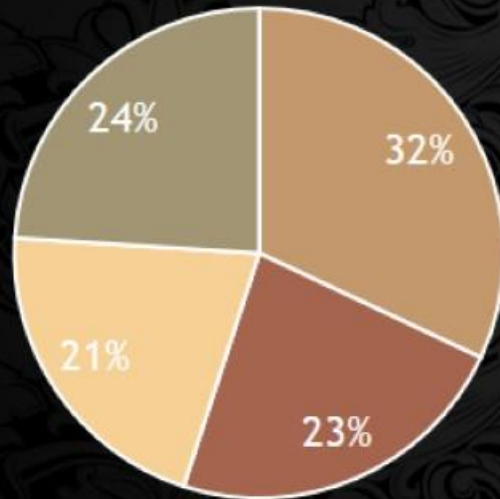
Boomers

Gen X

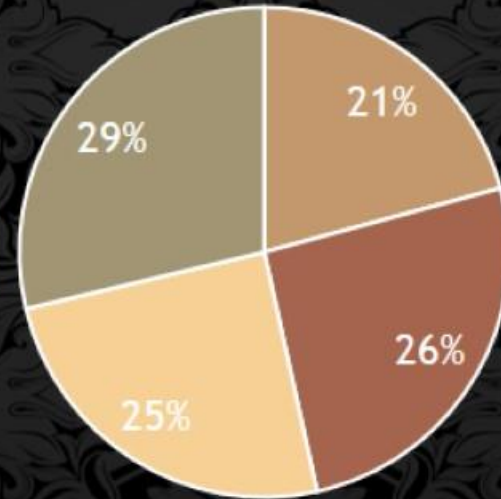
Gen Y
Millennials

Gen Z

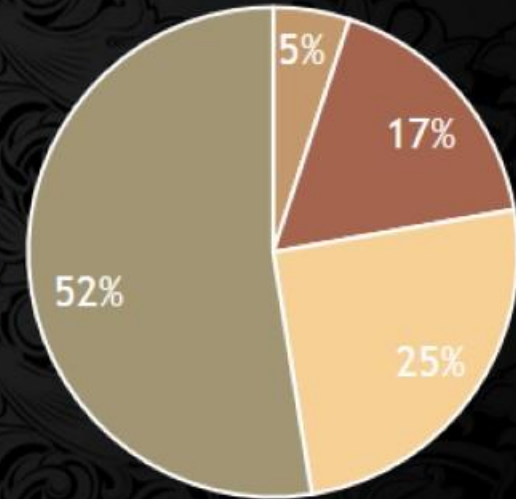
FULL LABOR MARKET



LEADERSHIP



BUSINESS OWNERS



**The ages represented in this chart are approximate and August not precisely align with established generational categories, subject to a variance of a few years. This visualization is intended for general informational purposes only and should not be considered exhaustive or definitive. For access to comprehensive statistics and detailed demographic breakdowns, interested parties are encouraged to contact the provided point of contact directly. This chart is provided "as is," and while every effort has been made to ensure the accuracy of the information, the creators make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the information contained within. <https://www.bls.gov/web/empsit/cpseea08a.htm>, <https://www.bls.gov/cps/cpsaat11b.htm>, and https://data.census.gov/table/ABSCBO2021.AB2100CSCBO?q=ab2100*&hidePreview=true&nkd=QDESC-009.

First line of defense is usually...

Director
of HR

7 out of 10
are female

Average age
42 years old



Business development campaigns

Creating 360° of your 401(k) Influence

Grow your awareness, influence and referrals by staying in front of your retirement plan prospects, clients and centers of influence.

Streamline and share insightful 401(k) content through your website, LinkedIn and email marketing campaigns to promote you and your firm as the trusted source for retirement plan expertise.



RECAP

1. Everyone is on their **phone**

2. Be where your **audience** is

3. Create and distribute **captivating campaigns**

4. How to add scale with **technology**

5. Questions, comments and ideas

THANK YOU!



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