

Working with Adviser Home



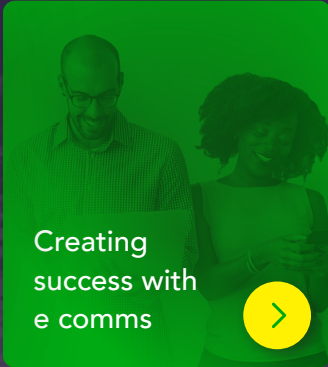
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Events Marketing Service

How we can help you with events marketing

Events are an essential and cost efficient way to create engagement with advisers.

A partnership ethos

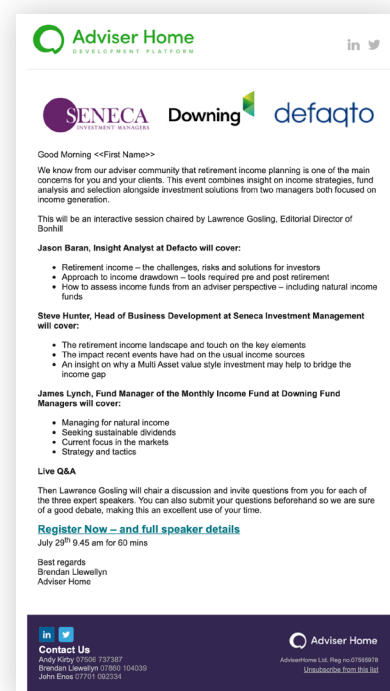
- We have a shared interest in the success of your events and our constant contact with the adviser market and with dozens of providers gives us an insight into “what works”. So we consult with you on objectives, message, content and how to set up the most effective events. Have a look at our guide to [Engaging with Advisers](#).
- Sometimes we recommend that an event would benefit from other speakers and our network of providers and industry experts proves invaluable in putting together a star line up. For instance we ran events for Money Alive – one on retirement income advice featuring Rory Percival on suitability and one on marketing to new clients during lockdown also featuring Phil Bray of the Yardstick Agency.

Moderation

- We find that events with a professional moderator encourage more of a dialogue with the adviser. A skilled moderator can sit in the adviser’s shoes and prompt the right questions – avoiding a straight “tell” session. We work with John Lappin, brief him on your behalf.
- Most of our provider clients have their own hosting system but if not we can help.

Driving adviser registrations

- We can issue a “solus” mailing focusing entirely on your event. This goes to our full adviser community (c 18,000) and should be issued around two weeks prior to your event. Depending on response and on campaign budget we can repeat.
- Normally you would provide the copy and the registration link and we would set up the email and issue.



Solus email

Continue ►

- We would issue a bulletin (InfoMix) to act as reinforcement/reminder for advisers.
- When we issue an e comms campaign we extend the reach using LinkedIn and Twitter
- When we work with you on e comms for an event we add the details to our [Adviser Calendar](#) which allows advisers to search by subject and date. If your event is recorded we can also place it on our new [On Line Events Collection](#) so advisers have a “catch up” service and you have extended value from your event.



InfoMix: reminder for advisers

Event Follow up

This is of course essential and the registration – whether you handle this or we do it for you- will take consent for you to make contact with advisers.

In summary

We always want to help make your event a success so we engage fully at outset, we then work to help you get the advisers on the event using ecomms, social media and our site facilities. Then post event we will discuss with you any learnings and ensure your event has a presence on our site after the date.





CPD Centre

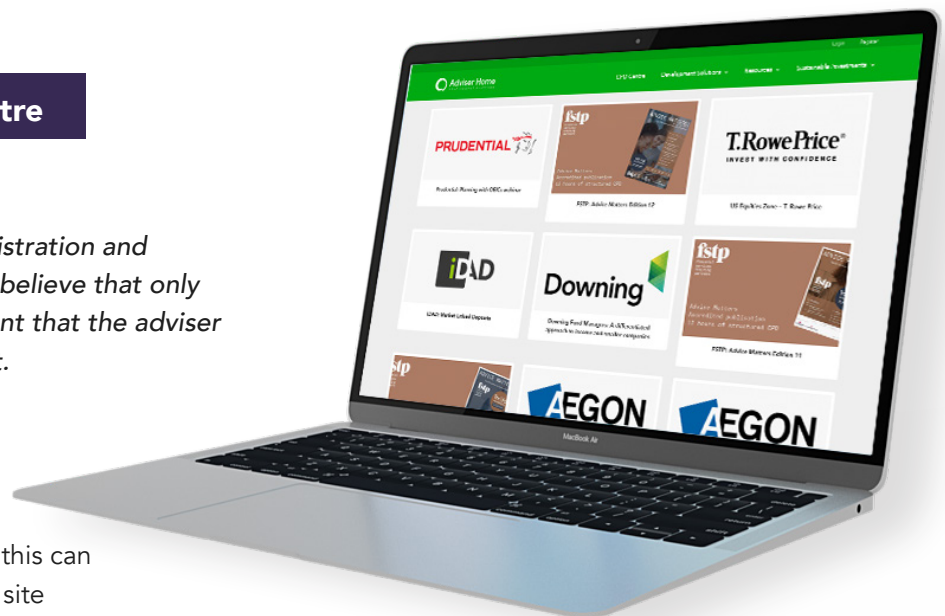
Encouraging advisers to engage with your CPD Content

All advisers need to secure their CPD and when advisers engage with your CPD they tend to do so at a deeper level.

As with all our provider clients content we can help with comment on what areas are most useful to advisers. Offering CPD can lift the appeal of content and give advisers an additional reason to engage.

The Adviser Home CPD Centre

This is all on line, saving you administration and paper. It is assessment based – we believe that only with assessment can we be confident that the adviser has gained value from your content.



- We upload your content here – this can be PDF or PPT, or a link to your site
- We provide you with a place on our content showcase page
- Advisers are directed to your content with your defined learning objectives
- Then advisers are taken to the assessment centre and complete a simple multiple choice test
- Advisers can repeat the test up to 10 times
- We then send advisers a CPD certificate in PDF form
- For assessment, advisers register their details and we take consent under GDPR to provide you with permission to follow up and contact advisers. Knowing an adviser has taken the time to study your content and take the assessment gives you a highly qualified opportunity. We send you full details in CSV format.

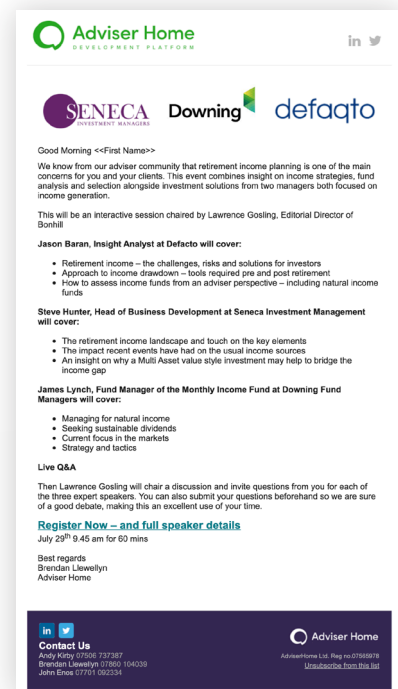
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CPD can be freestanding or event related

- Offering CPD can help drive registrations to your event but you can also offer CPD on other content

We can help with CPD accreditation and assessment

- If you wish we can arrange for your content to have defined learning objectives added and we can create the assessment, set pass mark and CPD amount and offer accreditation. With this full service approach you simply let us have the base content – we do the rest.
- Where we are working with you on events marketing then the CPD is a major attraction and we highlight in all communications
- We have a dedicated bulletin – CPD Mix offering advisers CPD from multi providers
- You can use the weekly InfoMix to house your headline and link. In fact if you run your own CPD site are we can of course link straight to that



CPD Mix





Creating success with e comms

Since we started Adviser Home in 2011 we have refined our approach and now digital marketing is more important than ever. Advisers receive a welter of communications from many competing providers and we can be a valued partner for you in ensuring that your communications stand out.

How we work

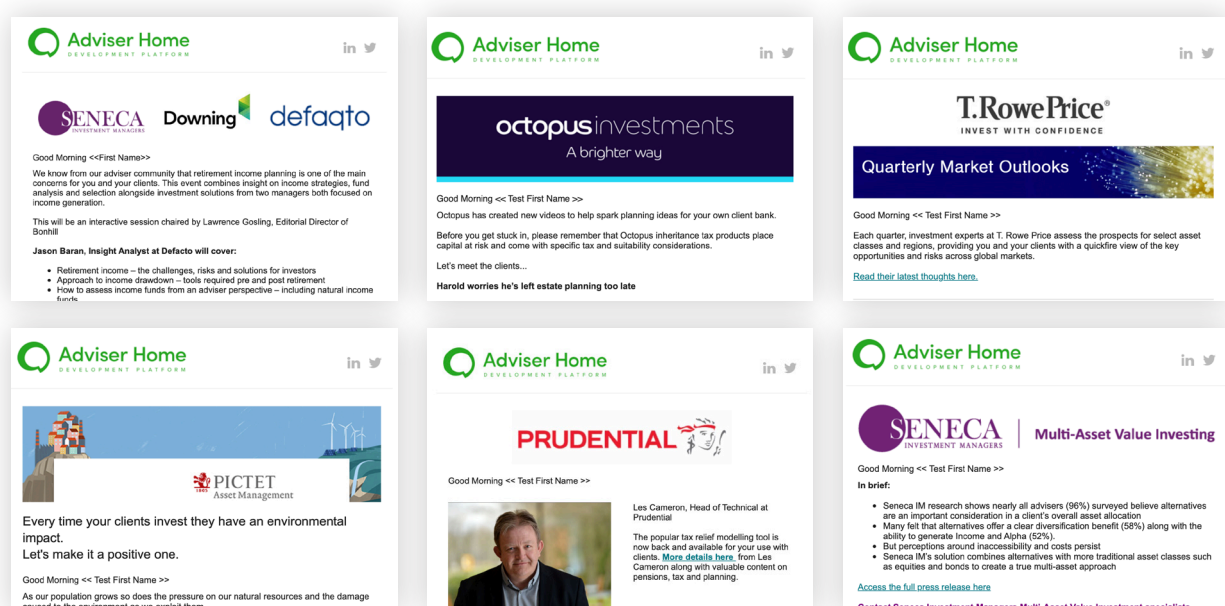
We issue all communications as from Adviser Home. Our independence assists response rate which is often better than even the largest brands can generate.

We try to assess everything we do by understanding the adviser audience – learning from experience. We have carried out over 1500 e campaigns and that experience is available to our provider partners

A shared interest in a good response. Our adviser community of c 18,000 individuals expect good, relevant content from us and we operate with a simple standard – will this help the adviser and their clients?

Solus emails

- Importantly we rarely issue more than two per week so our community do not feel over loaded and your message gets the opportunity to stand out and be noticed



Solus emails

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- Typically, you send us content and required links and we design a test for you to agree. We can normally accommodate requests for next week solus mailings
- You gain profile from all solus emails that our advisers open and then extra value when they click on your content
- Our provider clients use solus mailings with us to:
 - Engage advisers with their support or marketing development material
 - Alert advisers to their market or investment views
 - Announce a new product or service facility
 - Attract registrations to an event
 - Reinforce their own marketing activities with advisers
 - Reinforce their own e activity

Success cases

We respect client confidentiality so we don't discuss individual statistics. However, these recent solus emails were particularly successful.

octopus

How to overcome your client's investment fears

AberdeenStandard
Investments

Income investing in a pandemic - finding a way through

T.RowePrice 

ESG at T. R Price


PRUDENTIAL

Webinar Invite - Prudential With-Profit Life Fund & PruFund 2020 Strategic Asset Allocation

BMO 

You're invited: BMO Adviser Edge technical seminar – inheritance tax and volatility (two hours structured CPD)



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InfoMix - our weekly bulletin for advisers

- We also include a week's news digest created by John Lappin, leading industry commentator – and there is an opportunity for you to have your brand here – News Analysis in association with...
- We often include links to our current events or to our CPD Centre
- All we require if you wish to be included is – a headline and a link to the area of your choice. This might be a PDF, or an area on your own site you want advisers to visit
- If you have an ecomms or a site presence and e comms package with us it's entirely up to you how you use it. Some providers use InfoMix to reinforce a recent solus mailing, others have a constant them – an area of the market they wish to be seen as an authority
- We provide each two week a summary of activity and results – specifically emails opened and individual clicks.

The screenshot displays the Adviser Home website interface. At the top, there's a header with the Adviser Home logo and navigation links. Below the header, a prominent banner advertises a video by Octopus Investments, stating it's watched by more than 4,000 advisers. The main content area is divided into several sections, each featuring a headline and a green button for further action. These sections include: 'Rathbones - The Value of ESG Report - Is ESG now mainstream for advisers', 'AXA IM on Reasons to remain optimistic about dividend income over the long term', 'Fast Fashion - an expert briefing from EdenTree IM', 'The week in review from T. Rowe Price - US financial markets', 'Retirement Technical Videos - Taking the CII pension exams this October or just need a refresher?', 'The hidden human cost of Covid-19', 'CPD Catch up - new modules', and 'Introducers ordered to pay huge redress bill by court'. At the bottom, there's a 'Contacts' section listing three individuals: Brendan Llewellyn, Andy Kirby, and John Enos, each with their contact details. The footer includes the Adviser Home logo, a registration number, and social media links.

Solus email





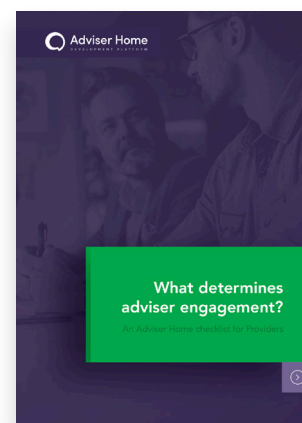
Developing impact with ESG

ESG or sustainable investing has been the coming theme for several years now but in 2019 and 2020 this has now converted to asset flows. The broader impact of the Pandemic is still to be felt but one clear trend has been an increased consumer commitment to doing good with investments.

We have been heavily involved in supporting our partner clients in this area with several events, research and both adviser and consumer guides over the last 4 years.

Now the EC's Sustainable Finance Initiative is set to be reflected in MiFID 2 in the early part of 2021 with a requirement for advisers to include ESG related questions on their client suitability advice and report. This will create a further boost to the sector.

“ In the first three months of 2020, Investors across the globe put \$45.6 billion into funds focused on ESG. This compares with global outflows of \$384.7 billion for the overall fund universe.



AdviserHome Guides

On site Sustainability centre

We have an opportunity for you to place your adviser focused ESG content on [our site](#). This offers a six months tenure where we take your content, design the page area, gain your approval and set live. You also have a position on our home page in the Partners area.

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E Comms support

We take a flexible approach and you can support your site position with a set of solus and InfoMix entries or concentrate on e comms. One client in this sector for example has a 13 InfoMix package allowing them to promote content as they require.

Research

We would like to talk to you about involvement in our research in this area. We are keen to understand.

- Adviser perspectives on aspects of sustainability
- ESG as a risk management overlay or as a vehicle for committed investors
- Need for assistance in suitability discussions
- What support do advisers need from providers?
- Which providers do advisers feel do the best for them in this area?
- Involvement in this research would give you brand coverage at all stages – from research request through to final report influence on the questionnaire up to two questions with responses confidential to you
- We would design the questionnaire, engage with advisers to attract their responses, provide an incentive (normally Amazon vouchers) collate and interpret all responses, draft and design full report and issue to respondents and interested advisers



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New Adviser Guide to Sustainable Investments

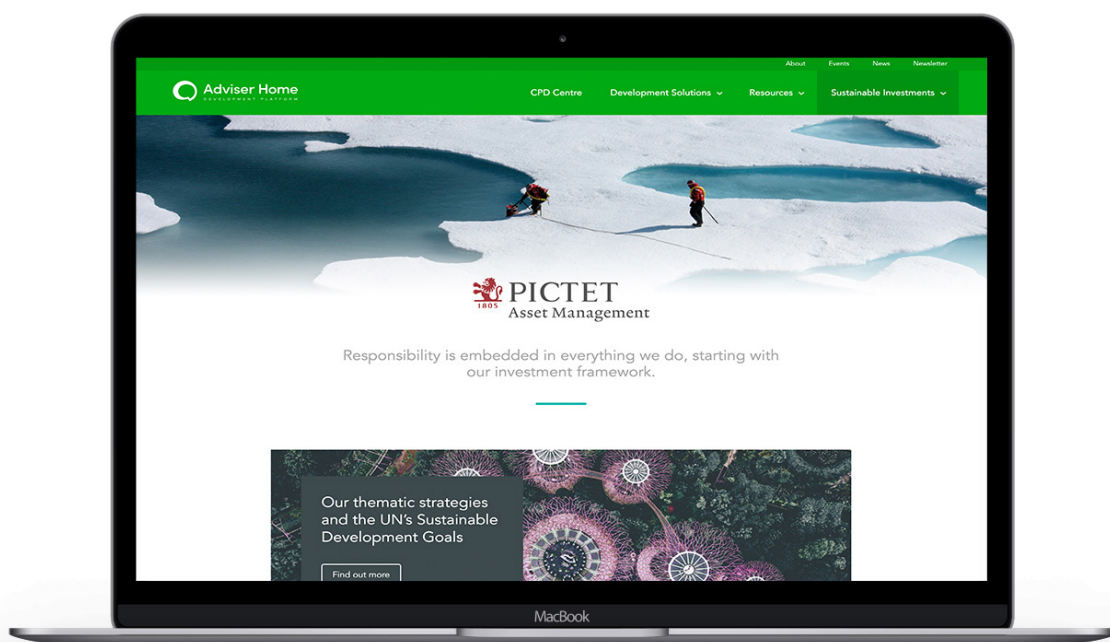
We plan a highly practical business guide for advisers and would like to discuss your support for this :

- Choices for advisers – single strategy funds, active v ETF, multi asset. Model portfolios and DFM
- Dealing with the attitude and suitability conversations
- Understanding the balance and relationship between pure investment objectives and ESG

Adviser Home ESG Webinar

We plan to hold a series of these and would like to discuss your potential involvement

- These would be limited to two to three providers (investment providers and risk/ ratings experts) to give presentations and take part in a panel discussion
- We would provide moderation and hosting
- We would be responsible to gaining advisers attendance
- Advisers registering would consent to contact from speaker companies so the initiative would provide you with ability to open conversations with advisers





Partnering with Adviser Home



- We are a development platform
- Our purpose is to help advisers run, market and develop their practice and to do this we work with select providers, helping them to communicate effectively with our 18,000 strong adviser community
- We are not simply a passive advertising medium and will always seek to enhance your message where we can
- We only deal with a relatively small number of providers so your share of adviser attention will be high
- We deal with all sizes of providers – from the very largest who see us as complementing their own efforts to the smaller niche providers who rely on us to help them build an adviser franchise

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- We operate with a small team of directors, with huge market experience in advice, consultancy and senior management. All your contact will be with one of our directors and we have developed a strong partnership ethos so we only embark on activities we believe will work for you. We are also keen to react quickly all having enough experience to know you will have tight deadlines from time to time.
- Our wide professional networks can be made available to help your marketing and distribution – this might be informal – if you are looking for new resource, or in pulling together a team of star presenters to support your event
- Commercial involvement options are wide and flexible. Several clients take 12 months rolling packages whilst others commit to a trial of a few e campaigns and then roll out involvement as a result
- We can work with you on
 - Site presence – in our [Development Zone](#) or our [Sustainability Zone](#) or our [CPD Centre](#)
 - E-comms – your own solus campaigns or bulletin entries
 - Research – either partner with our research or ask us to look at your research needs. Our Investment Advice 2020 Research attracted over 1850 downloads and covered important issues on how advisers were coping in the midst of the lock down – valuable insight for both providers and adviser
 - Continuous brand exposure
 - Leaderboard banner on home page
 - Leaderboard banner on home page www.adviserhome.com



- Strip banner at foot of InfoMix
- [CPD](#)
- Adviser Events – we can support yours or work with you to create a bespoke event





Retirement Income Solutions

Case study



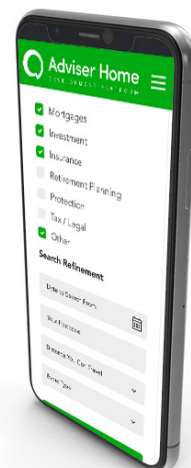
For the specialist or boutique style asset managers more work is sometimes needed to ensure adviser engagement. Similarly co marketing can work effectively so advisers gain from a broader picture. And then an external expert view can help along with a professional moderator.

- With this in mind we worked with Seneca IM, Downing and Defaqto to create an event around retirement income – risks and investment solutions



- Lawrence Gosling, experienced journalist, commentator and founder of Investment Week provided moderation and chaired the event
- Defaqto were brought in to set the scene on retirement income, risks, strategies and suitability
- Seneca IM and Downing – each gave their respective solutions – multi asset and single strategy
- Adviser questions were sought before the day and answered on the day along with
- We generated adviser registrations through two solus emails and two InfoMix entries. Monitoring registration levels throughout the campaign
- The event was posted on www.adviserhome.co.uk/events
- The three Adviser Home directors each publicised the event on LinkedIn and Twitter
- Adviser Home took care of registrations, webinar hosting and admin support for delegates

All parties were delighted with the response from advisers and the asset managers supporting the event can follow up with advisers who registered so they can work with them to develop profitable business relationships





Business Protection

Case study



For the specialist or boutique style asset managers more work is sometimes needed to ensure adviser engagement. Similarly co marketing can work effectively so advisers gain from a broader picture. And then an external expert view can help along with a professional moderator.

Site Presence on Adviser Home

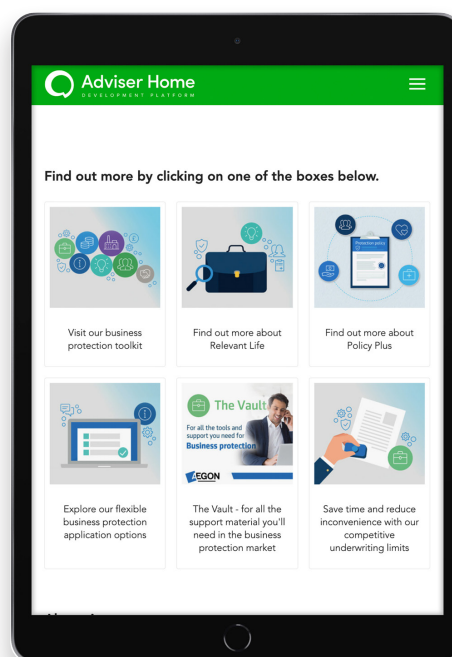
In our Development Solutions zone we have an area for Corporate Protection in association with [Aegon](#). This acts as a convenient area for advisers to access the best content on business development including their business protection toolkit and technical support into areas like Relevant Life.

Ecomms

Aegon offer an excellent flow of support content for advisers and we work with them to present this in the best way possible – from technical support on trusts to development tools like their Business Intestacy and Protection Audit service.

Joint webinars

Adviser Home have run these events for Aegon – we attract advisers to attend, set up registration, rehearse with Aegon presenters and host the event. These events have proven to be extremely popular and allow Aegon's business development team.



CPD Centre

During the webinars we remind advisers at the start and end of the CPD facility and how to access it. Once on the Centre advisers can go through the content again if they wish or move straight to assessment to gain their CPD Certificates.





Marketing for an asset management group - A focus on US Equities

Case study

The US represents almost half of the world's market value and T. Rowe Price have a strong heritage as experts in this market and have been creating impact in the UK retail space.

Site solution

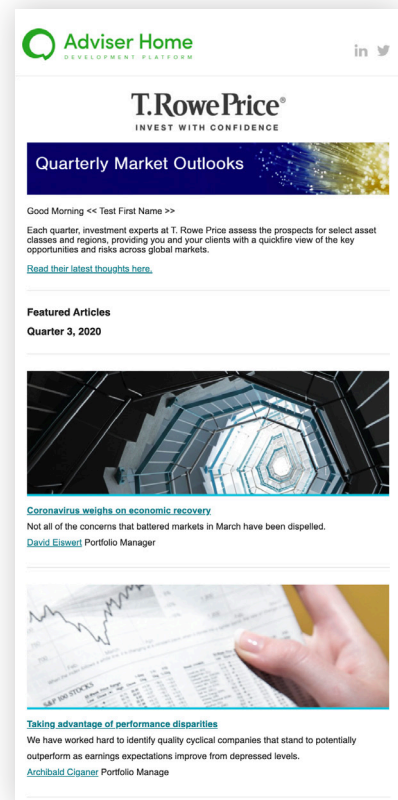
We worked with the marketing team to create a showpiece area for them in our [Development Solutions](#) area showing their key credentials.

Site solution

- Using our weekly bulletin – InfoMix – we have featured T. Rowe Price weekly market update on the US. This gives exposure to our 18,000 adviser community and offers advisers a regular authoritative update on this market sector
- Message uplift with tactical solus emails
- To reinforce their brand presence they also ran a strip banner at the foot of each InfoMix

Message uplift

- From time to time T. Rowe Price run solus campaigns either to reinforce the US expertise message or to widen the scope to include webinars on global perspective



Solus email



Contact

If you have any comments or questions on this
please contact **John Enos**



john@adviserhome.com

