



Expand the reach of your RIA with Raymond James' marketing agency

From crafting a distinct brand to connecting you with clients, learn how we can take your RIA to new heights.

As an independent RIA, you have the freedom to create a brand for your firm that is truly your own and speaks to the value you provide to your clients. Raymond James Marketing – our award-winning, in-house agency – is home to more than 150 creative professionals committed to helping you craft a unique brand that resonates with both prospects and clients, so you can stand out from competitors and make a lasting impression on the audience you most want to reach.

MAKE YOUR MARK

The RIA segment is the fastest growing in the industry. Still, there's no other advisor like you – and no business like yours. Raymond James Marketing helps you tell clients why that is and, more importantly, why they should care.

Our agency helps accomplish this through a suite of sophisticated creative services:

Marketing strategy – Our seasoned account managers serve as your personal marketing strategists, walking you through the creative process from idea to execution.

KEY TAKEAWAYS

Raymond James Marketing is led by award-winning creators and dedicated account managers with in-depth knowledge of the financial services industry.

Our team helps RIAs craft distinct brands that resonate with clients and prospects – and distinguish them from competitors.

Leveraging our firm's robust technology, we provide marketing services that are both innovative and cost-effective.

Custom branding – We can design and develop a coordinated suite of materials that evoke a look, feel and client experience that is distinctly your firm's.

Graphic design – From creating a logo that reflects your business to designing brochures, stationery and more, our graphic designers can bring your marketing vision to life.

Writing – Applying their in-depth understanding of the financial world, our tenured writers help communicate who you are and what you do, reinforce your credibility, and inspire confidence in your clients and prospects.

Website development – Your website is the heart of your online presence. That's why we develop highly personalized websites with responsive mobile capabilities to serve as a functional, ongoing point of connection for your clients. We also use tools such as Google Analytics to track client engagement. Another plus? Marketing-hosted websites are automatically and routinely updated with the latest thought leadership and lifestyle content from Raymond James. And you can add your own posts, too. Best of all, you still maintain full control – choosing which content, if any, auto-populates on your site.

Video and audio – Our full-service video and audio studio provides valuable insights from Raymond James thought leaders to support planning for all aspects of life. Spanning topics such as investing and longevity resources, our timely videos update automatically on Marketing-hosted websites, depending on the preferences of each RIA.

Social media – We offer personalized social media consulting to help you meaningfully connect with clients and leverage Raymond James content on various platforms, including LinkedIn, Facebook and Twitter.

DELIBERATE, PERSONAL MARKETING

No matter how long you've been in the business, your time is best spent focusing on clients. Raymond James feels the same way – which is why we cater to the needs of each RIA firm, including when it comes to marketing. Just ask Todd Welsh, founder and senior partner of Scissortail Wealth Management.

"My partner and I had been in the wirehouse world for nearly 20 years. As you know, the marketing there is pretty limited. It took weeks to get a response about any marketing request and all we could really do was market the wirehouse anyway," said Todd, who was impressed by the Marketing team's quick turnaround times and hands-on approach, particularly when it came to building his site.

"Now, we can be specific and intentional with our marketing – and that's been worth every penny. Our website is a prime example. Not only is it sleek and modern, it also does an excellent job of telling our story and what we're about. So when someone visits it, they can get a good feel of who they'll be talking to if they come see us."

Like many RIAs, Todd also found Raymond James Marketing's firsthand knowledge of the financial industry a game changer.



57%

of clients will not recommend a business with a poorly designed or unresponsive mobile website

Source: Swear

79%

of adults use social networking sites

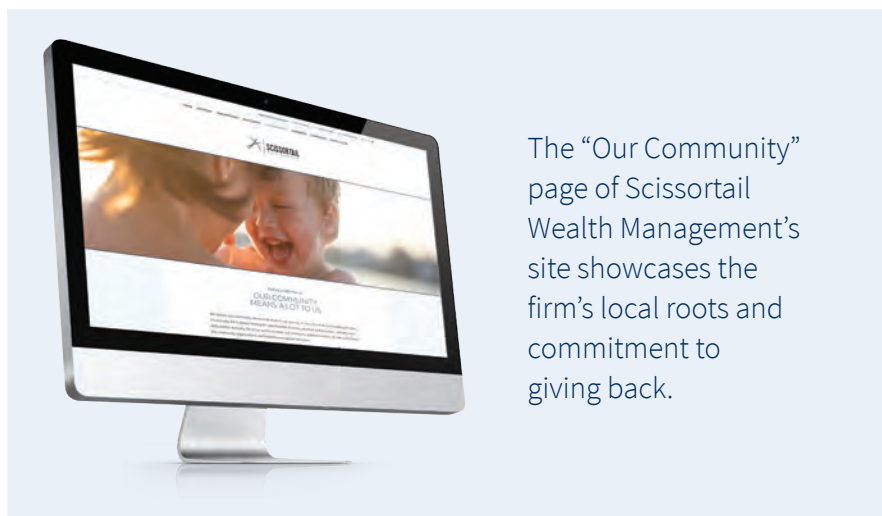
Source: Pew Research Center

75%

of small business owners believe internet marketing is crucial in attracting new clients

Source: fundera.com





The “Our Community” page of Scissortail Wealth Management’s site showcases the firm’s local roots and commitment to giving back.

“They have experience working with firms in our situation, which helps facilitate the entire process,” he said. “When we were talking about moving, they knew exactly what we were having to go through. Even the fact that our website automatically populates with new Raymond James content is really nice. That’s definitely a standout benefit.”

Determined to make the most of their new marketing opportunities, Scissortail Wealth Management recently added a community page to its website – a move that’s already proved its worth.

“Just last week, we had someone call in and say, ‘We were on your website because we need some financial advice. We saw which church you attend and that you’re really close, so we’d like to come in and talk,’” Todd said.

AT THE NEXUS OF TRADITION AND INNOVATION

Marketing’s capabilities extend far beyond crafting new brands. As Dominick Tavella, president and CIO of Lebenthal Global Advisors, LLC, and Michael Hartzman, CFP®, president of Lebenthal Financial Services, Inc., learned, our agency also has the nuanced know-how to consolidate different entities under a streamlined identity.

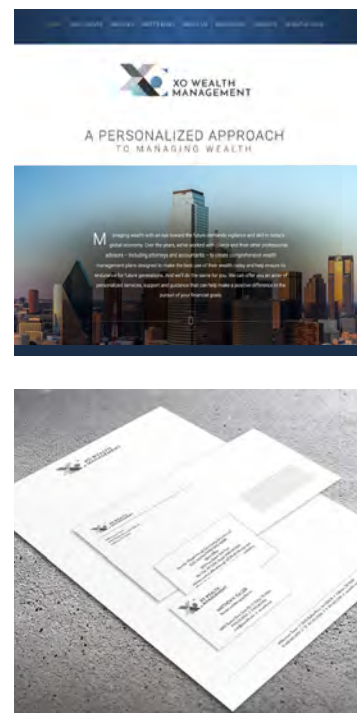
“We acquired the Lebenthal brand – which has almost 100 years of history – before joining Raymond James,” Dom said. “We owned a broker/dealer and an RIA under two different brands – both under the same Lebenthal name. It’s a huge benefit, but that was difficult to explain to prospective clients.”

That’s where our Marketing team came in. “Raymond James Marketing helped align both businesses – Lebenthal Global Advisors, LLC, and Lebenthal Financial Services, Inc. – under a single brand that showcased our collective principles. **The agency’s creative and strategic guidance allowed us to maintain our traditional values while upgrading our feel and look to resonate with modern clients.**”

Dom asserts that the combination of Lebenthal’s storied history and Marketing’s innovative touch has resulted in a deeply distinct brand – one they’ve successfully promoted through coordinated materials and a prominent online presence.

Results that speak for themselves

Matthew Fuller, founder and managing director of XO Wealth Management, leveraged Raymond James Marketing to expand his RIA firm’s reach. Matt worked with Marketing to start his own blog on his business website, relying on our speedy turnaround times and diligent web services team to post timely content with ease. To ensure the time spent investing in your website pays off, our agency tracks website traffic and engagement using the latest reporting tools.



“I look at competitors’ websites, and they’re often the same,” Dom said. “Raymond James Marketing gave us a truly unique site with custom imagery and messaging. They even developed a splash page where clients can choose between our custody services business or advisory side depending on their needs.”

CRACKING THE FORMULA FOR SUCCESS

Dom encourages others in the RIA space to focus their marketing efforts on existing clients, because no one can vouch for you like they can.

“Almost 90% of our marketing is directed to current clients, who are a tremendous source of referrals. Instead of opting for mass blasts or ads, we use marketing to build our clients’ trust and reinforce our credibility.”

To that end, the Lebenthal team added a “recent interviews” section on their site with videos of Dom’s regular guest appearances on news outlets. They also have a podcast – designed specifically for existing clients – in the works.

Perhaps best of all, the busy Lebenthal team has been able to reap the fruits of their hard work without breaking a sweat.

“Raymond James Marketing’s response times and website updates are lightning fast, which has helped keep our content fresh with minimal work on our end,” Dom said. The team has also leveraged Google Analytics to measure the success of their marketing efforts and gain insight into the topics that most captivate their audience.

Our agency will work with you to establish a regular communication schedule that will nurture new and existing client relationships without hogging precious time. Yours for the taking is a full suite of high-touch turnkey materials – from customizable client cover letters and emails to our Raymond James communications calendar and quarterly publications spanning lifestyle topics, market commentary and practical investment guidance.

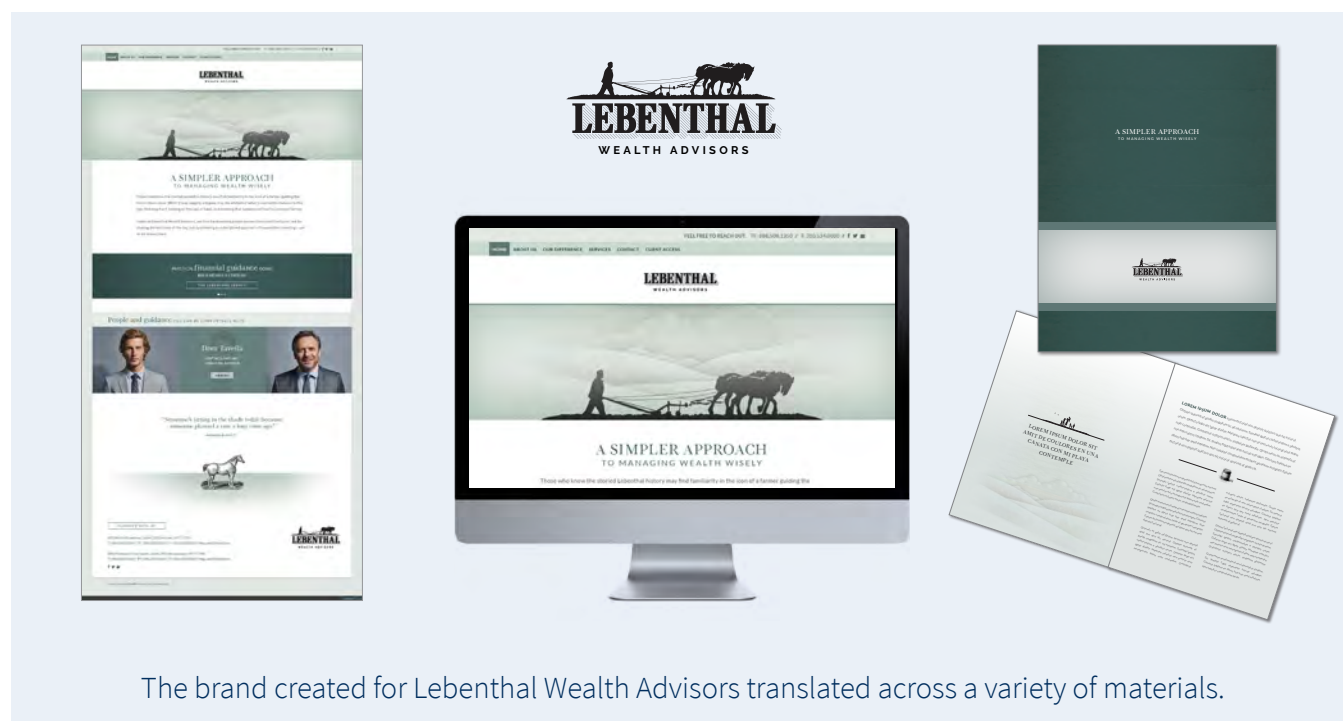
STARTING WITH WHY

Every Raymond James Marketing team member understands that their mission is to create brands as unique as the advisors they serve.

“My favorite part about working with RIAs is that they’re so different from one another,” said Maggie Kokemuller, the department’s vice president. “Our job is to create authentic, trustworthy brands by articulating those differences.”

According to Maggie, identifying and promoting advisors’ distinct value propositions is the foundation of any effective marketing plan.

“RIAs need to define what makes them different and build on that,” she explained. “In his book ‘Start with Why,’ Simon Sinek says that before you can expect people to give you their attention (or time, or money) for ‘what’ you do, they need to connect with ‘why’ you do it. I think that philosophy holds true for any brand in a competitive industry, including ours.



The brand created for Lebenthal Wealth Advisors translated across a variety of materials.

“When an RIA firm engages our agency, we kick off our discovery process with a number of conversations and a lot of questions. We do that before starting any creative brand development. That’s because we consider it essential to get to the heart of their brand, reveal their ‘why’ and then build from there.

“We also provide comprehensive brand support, ensuring that digital and print materials offer a cohesive client experience.

And because we have no profit margin mandate, we charge firms a lower hourly rate compared to similar standalone agencies, passing through external costs (such as print production and image rights) with no upcharge.”

Like Todd, Maggie believes the agency’s in-depth knowledge of the financial industry facilitates the creative and discovery process.

“There’s no need to explain the basics of the industry, of regulation landmines or even of target markets (with a few exceptions). So we can dive right into that differentiator discussion.”

NEXT-LEVEL MARKETING

Maggie’s sentiments are echoed by the senior vice president of Marketing, Lisa Turley.

“With a true understanding of what RIAs do and the importance of building their brands, we can take their marketing to the next level.”

Lisa also affirms that – just like with any prosperous business – the factors that differentiate Raymond James Marketing from competitors are the reasons advisors flock to the agency.

“What I see as a distinguishing advantage for Raymond James is a blend of two things: The freedom to create a custom brand for your RIA paired with the robust internal resources to execute your vision. As an in-house agency led by talented creative professionals and marketing strategists with deep industry knowledge, we are uniquely positioned to help RIAs fulfill their growth goals and pursue their definition of success.”

3 marketing pro tips

1

Determine what sets you apart from competitors – and then play to your strengths.

2

Establish a regular communication calendar to consistently share your thought leadership and connect with clients and prospects.

3

Cater to clients of the digital age with an optimized, responsive website.

What more does Raymond James offer RIA firms? Find out at RaymondJamesRIA.com or by contacting our [business development team](#).

RAYMOND JAMES®

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER
880 CARILLON PARKWAY // ST. PETERSBURG, FL 33716 // 800.248.8863