**COVID CRISIS**

Digital Marketing Do’s and Don’ts

**FOR FINANCIAL ADVISORS**

**DO**

- **Regularly Connect with Clients**
  - In times of crisis and economic uncertainty, it’s important to regularly connect with clients. Let them know what you’re doing and how you can help them.

- **Address the Problems Your Clients & Prospects Face**
  - Make sure you’re addressing the problems your target audience is facing. If your clients are retired, then the CARES Act school loan relief will likely not be of interest to them. However, RMD relief would be.

- **Keep Advice Short and Easy to Understand**
  - Everywhere you look there is more information and updates on COVID. Avoid overwhelming your audience by keeping your messages short and staying away from industry jargon.

- **Provide Resources Online**
  - As you create resources to help guide your clients through this crisis, make sure you keep them in a central location on your website. Information posted on your website can be searched unlike information in a social media post.

**DON’T**

- **Don’t Forfeit Accuracy for Timeliness**
  - With new updates coming out frequently on the pandemic situation, it can be easy to get caught in the “I need to be first” mentality. But, providing inaccurate information will have a much bigger and longer impact than being the first to provide information.

- **Don’t Leave Them Guessing**
  - Everywhere you look there is more information and updates on COVID. Avoid overwhelming your audience by keeping your messages short and staying away from industry jargon.

- **Don’t Spread Fear or Negativity**
  - Whether they believe the current social distancing regulations are needed or not, Americans share one thing in common - anxiety over the situation and economic repercussions. It’s important now to highlight the positives in the situation and point how the opportunities that exist.

- **Don’t Stop Prospecting**
  - Don’t be afraid to tell your clients to share your resources with people they know who may need it. Now more than ever people need the guidance of a financial advisor.

- **Don’t Leave Them Guessing**
  - Tell your clients and prospects how they can reach you, what your process is, and what you’re doing for clients during the COVID crisis.

It may seem counterintuitive, but now is one of the best times to invest in marketing and advertising. People are online more than ever before, which helps your ad dollars go further.