

# Unlocking Business Growth through Client Education

As the pandemic wanes, financial professionals looking to grow and streamline their businesses should make client education core to their strategy.

## Top Strategic Priorities for 2021

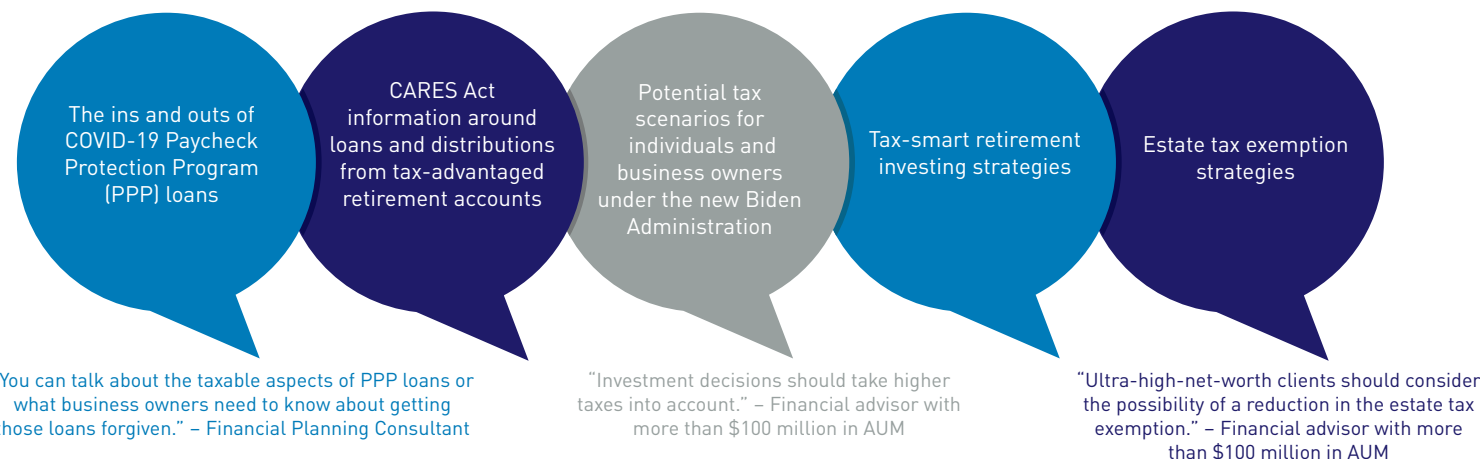


## To meet growth goals, firms are shifting resources towards:



## Client Education Topics

Thoughtful financial professionals are covering a host of financially focused topics including:



## Schooling Clients

Use a variety of methods to deliver educational resources:

### GROUP MEETINGS.

In today's socially distanced environment, consider hosting online meet-ups or webinars for interested clients on topics such as tax-smart investing or new service offerings.



### EMAILS.

Reach out to clients directly, but make sure materials are relevant and targeted to their situation. Coming up on tax time? Might be a good time for an email on tax-loss harvesting to clients who would benefit.



### SOCIAL MEDIA.

Whenever possible, share original content on social media. Doing so will help elevate your credibility with your clients and prospective clients. Doesn't have to be long, can be a short note on the latest thinking on capital gains or changes to social security.



## Methodology

Avantax partnered with Accounting Today/Financial Planning to understand the challenges and priorities that tax and financial advisor professionals are facing serving the needs of their clients and growing their businesses. The online survey was conducted in November and December 2020 among 99 professionals that offer financial advisory services, 46 of which had a dual tax/financial planning role.

**For more information on strategies and tools to help education your clients, visit [www.avantax.com](http://www.avantax.com).**