# **Unlocking Business Growth through Client Education**



Use a variety of methods to deliver

**Schooling Clients** 

educational resources:

clients on topics such as tax-smart investing or new service offerings.

Reach out to clients directly, but

clients who would benefit.

SOCIAL MEDIA.

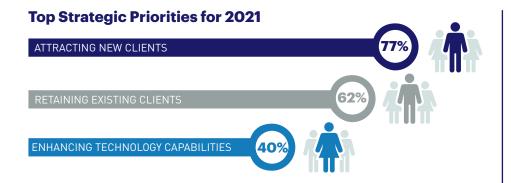
make sure materials are relevant and targeted to their situation. Coming up on tax time? Might be a good time for an email on tax-loss harvesting to

Whenever possible, share original content on social media. Doing so will help elevate your credibility with your clients and prospective clients. Doesn't

**GROUP MEETINGS.**In today's socially distanced environment, consider hosting online meet-ups or webinars for interested

**EMAILS.** 

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



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



Conducting marketing to attract new clients



Providing educational resources to existing and potential clients



Partnering with other financial services providers to expand the range of client services

## **Client Education Topics**

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



"You can talk about the taxable aspects of PPP loans or what business owners need to know about getting those loans forgiven." – Financial Planning Consultant "Investment decisions should take higher taxes into account." – Financial advisor with more than \$100 million in AUM "Ultra-high-net-worth clients should consider the possibility of a reduction in the estate tax exemption." – Financial advisor with more than \$100 million in AUM

### **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.

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