

Social media tools for success

Resources for retirement plan advisors to help you stand out from the crowd.

Social media: an essential part of a marketing toolkit

Connecting with plan sponsors and investors about the importance of lifetime income requires a multi-pronged outreach approach—and social media is a vital component of advisors' marketing strategies.

Maximize social media to promote lifetime income

Lifetime income is top-of-mind for many American workers and their employers, and social media offers a unique way to present yourself as a trusted source of information and insights to plan sponsors. But it takes time and effort to do it well. By following a few guidelines, advisors can consistently create and deliver messages that will resonate.



Put your best face forward on video

Video is an increasingly important part of connecting with people via social media. Sites like LinkedIn and Instagram make it easy for you to record and upload videos. But the quality of the video matters. Following these best practices can ensure you look and sound great on screen.

ATTIRE In most cases, wear what you'd wear when meeting with a client.

CAMERA A good webcam makes a big difference in the quality of video; avoid the temptation to use your phone.

LIGHTING Ring lights mounted near your camera provide good lighting, otherwise, a bright room should suffice; avoid backlighting — your audience wants to see your face.

MICROPHONE Your webcam's or computer's microphone may suffice if you sit close enough, but it may be worth investing in an external microphone if you plan create videos regularly; using a headset can help minimize outside noise, but can be distracting to the viewer.

BACKGROUND Avoid blank walls that catch shadows or windows that can create backlighting; bookshelves or other professional backgrounds can set the right tone.

DISTRACTIONS Prepare your space to minimize outside noises and visual distractions that can lead to re-shoots; shut your door, turn off your phone and computer, close your window.

56%

of financial advisors are leveraging personalized recorded video content¹



Don't do it alone

There are many resources available to help you make the most of your social media efforts.

INVESTMENT PARTNERS

You don't have to create all the content yourself; look to share or repurpose from lifetime income articles, stats, videos and other social content from asset managers and investment industry resources, such as:

- Articles from relevant publications
- Data or research
- Videos from news sites or asset managers series
- Practice management resources including prepackaged posts, graphics and other content
- Educational and networking events

DESIGN PLATFORMS

Sites like Canva, Shutterstock and others can help non-graphic designers put together professional looking designs.

CONTENT GENERATORS

AI sites like ChatGPT can save time by writing first drafts of posts for you to adapt to your voice.

ONLINE RESOURCES

Sites like LinkedIn Learning and HubSpot Academy provide social media training, data, research and other useful information.

MAKE IT MEANINGFUL

Deliver relevant lifetime income content to plan sponsors by:

- Discussing the types of lifetime income solutions and the nuances of each
- Sharing trends, data or other industry research
- Giving your thoughts on lifetime income's importance to the American worker.

KNOW YOUR AUDIENCE

Tailor your posts to the needs and perspectives of the target audience. This starts by understanding your audience's:

- Demographics, including age, gender, location and race
- Preferred social media platforms
- Reasons for viewing — education, information, engagement, etc.
- Position/role within their company

FOCUS ON ACTION

Including a specific next step for your audience will promote engagement and allow you to track the results of your posts. Common calls-to-action include:

- Take a survey
- Join an event
- Contact me
- Read more

CHOOSE THE RIGHT FORMAT

Decide which type of content will be most effective for engaging with your audience:

- Videos allow for a human connection and are good for simplifying complex topics
- Infographics convey data and information quickly
- Thought leadership offers detailed, value-add content for those seeking a deep-dive
- Events encourage clients and prospects to engage in person or at webinars

Please check your firm policies prior to implementing any ideas presented including checking your firm social media policy prior to posting to any social network.

Visit nuveen.com/LifetimeIncomeInfluencer to learn more.

Endnotes

1 Source. Socialive. <https://socialive.us/ebooks/wealth-management-guide-video-marketing-strategy.html#insight-1>

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Lifetime income typically refers to a payment option, the payments are backed by the claims paying abilities of the issuing company.

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