

How to Strengthen Relationships, Increase Share-of-Wallet, and Generate Effort-Free Referrals through Quality Content Creation and Digital Tools - including ChatGPT and other AI-assisted Solutions

Marie Swift, CEO and Head Strategist, Impact Communications, Inc.

Jonny Swift, Vice President and Director of Social / Digital Strategy, Impact Communications, Inc.

Not every advisor wants to add new clients, but all advisors want to maintain the business they already have while strengthening relationships with their current clients and the next generation, ultimately leading to more share-of-wallet, better referrals, and effort-free, consistent business success. This session will focus on client communication strategies utilizing AI and other digital tools, showcasing use case studies and quick tips for those just getting started with AI for content creation.



Learning Objectives:

1. Learn about client communication and content creation strategies that will help to build stronger relationships with current clients, increase share-of-wallet, and generate effort-free referrals
2. Discover digital tools and technologies that can help with client retention, including surveying and feedback tools, social media platforms, generative AI tools, client engagement apps, fintech solutions, and more
3. Learn how to create authentic, personable content that resonates with next-gen clients and children of current clients by lifting the veil to show behind the scenes into the character and culture of your firm
4. Discover new ways to engage prospective clients using some of the latest money-in-motion AI-driven identifying tools, and digital lead generation platforms

ABOUT MARIE SWIFT

Marie Swift is President and CEO of Impact Communications, a full-service PR and marketing communications firm that works solely within the financial services industry.

A prolific writer, Marie's articles have been published by Barron's, MarketWatch, Forbes, WealthManagement.com, NAPFA Advisor, RIA Intel, Financial Planning, Financial Advisor, ThinkAdvisor.com, Morningstar Advisor, Executive Roundtable Journal, and more. She has been quoted in respected publications such as The Wall Street Journal, RIABiz.com, and Investment Advisor magazine.

Marie is in demand as a speaker at conferences for financial services professionals including Dimensional Fund Advisors, AICPA PFP/CIMA Summit, TD Ameritrade LINC, Pershing Insite, Fidelity's Inside Track, Schwab Regional Advisor Symposiums, the Financial Planning Association, the National Association of Personal Financial Advisors, the Alliance of Comprehensive Planners, InvestmentNews' Women To Watch, Financial Planning's Women Advisors Forum, Bob Veres' Insider's Forum, Jolt! Marketing Conference, Securities America, United Planners, Transamerica, Cetera, and other independent advisor and broker/dealer conferences.

In 2021 and 2022, Impact Communications earned recognition from WealthManagement.com in their annual "Wealthies" awards competition, and ThinkAdvisor.com named Marie to their Luminaries Class of 2021. She is a member of the Forbes Agency Council, a by-invitation-only consortium of marketing and PR professionals who meet the high standards of the Council program.

Her Swift Chat podcast/video series is at www.MarieSwift.com, and she's @MarieSwift on Twitter.

ABOUT JONNY SWIFT

Jonny Swift serves as Vice President of Impact Communications, as well as director of Social/Digital Strategy, where he specializes in online presence, public relations, content creation, and account management. Jonny consults with clients on digital media best practices and online presence; produces videos, podcasts, news releases, bylined articles, copy, marketing collateral, digital advertisements, email newsletters, interactive online tools, and other content; and provides insights based on data analytics. He manages several client relationships through which he and a team of other marketing professionals deliver on clients' strategic goals and business objectives.

Jonny has presented his social and digital media marketing tactics and best practices at the Barron's Top Women Advisors Summit, ACP National Conferences, Morningstar Investment Conferences, the T3 Technology Tools for Today Conference, NAPFA's Midwest Regional Workshop, FPA Chapter Meetings, Bob Veres' Insider's Forum, Advyaon Conference, Advisor Thought Leader Summit, plus is a repeat presenter in the NAPFA Playbook virtual training program. In addition, Swift has delivered a handful of Hub Talks, both in-person and virtually, at

the Morningstar Investment Conference via the Social/Digital Hub, created in partnership with Morningstar's experiential marketing and U.S. conference planning team.

In 2015, Jonny graduated with a Master of Science in Predictive Data Analytics with a concentration in Marketing from DePaul University's College of Computing & Digital Media. He moved back to Impact's hometown of Kansas City in late 2016 with his wife, Courtney Swift, RN, BSN, CPN, after marrying that summer in Chicago, where they met and both attended undergrad at Loyola University Chicago. They welcomed their first child, Jameson (Jamie), to the world in October 2020. In his spare time, Jonny enjoys producing electronic music, attending concerts with friends, collecting vinyl records, bowling, golfing, and watching KC Chiefs football and Kansas Jayhawks basketball. He is a Southwest Airlines' frequent flyer and travels whenever possible. Bike rides along the KC riverfront and recreational basketball games keep him fit for the hikes, ski trips, and other outings he enjoys with friends and family members.

Learn more at www.ImpactCommunications.org