



Quick guide to
becoming the
ultimate
independent
advisor



Carte
Financial Group

Quick guide to become the Ultimate Independent Advisor



Checklist

Here is a **simple checklist** that will help guide you on the right path for success:

- **Broker Support**
Back-end support is critical to access client information and an internal team support makes all the difference so you become a diligent advisor.
- **Effective Website**
Having an online presence is critical in this competitive industry. A clear message about you, your business and your process is important to help build brand awareness within your network. Providing quick access about your business is an effective strategy to capture online leads. Just remember, if you are not getting the leads, someone else is!
- **Activate Compliance-friendly Content**
Blogs, podcasts and videos are great ways to engage with your clients and potential clients. It also helps to position yourself as a financial industry expert. This will develop the perception of being a trusted advisor. Brand building happens when your strategy is consistent.
- **Technology**
Integrated platforms are an amazing way to optimize your business. Today it's easier than ever to provide an updated Financial Needs Analysis and uncover opportunities that allow your clients to know you are on top of their financial future. Staying in touch with your clients and accessing reports to know their interests makes it easy to know which clients you need to reach out to.
- **Social Media Posting Automation**
What is your message on Social Media? How are you complimenting your marketing efforts on these widely used platforms? Are your posts already compliant? How much opportunity is there out there anyway? Let's just say that Social Media is important to understand. It can be made simple and it should be a key part of your marketing strategy.
- **Get involved in Financial & Marketing Workshops**
It's great to connect with other advisors and professionals in the field to implement new strategies and identify industry trends. Education will only empower your mind towards success. Learning from other advisors will also encourage you to build a better practice.

Live the ultimate **independent advisor experience** today



HEAD OFFICE
425-6755 Mississauga Road
Mississauga, Ontario
L5N 7Y2

Learn more at
cartepartners.ca



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