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**Ten Keys to Putting Credibility Marketing to Work**

*CEG Worldwide research finds elite advisors are SMART about accountability, teamwork and execution.*

SAN MARTIN, CA—February 14, 2011—CEG Worldwide, the leading coaching, consulting and research firm for elite financial advisors, has announced new research identifying the strategies most frequently cited by top-performing financial advisors to execute effective credibility marketing.

“Even after having narrowed their focus on only the best methods for their business, advisors still commonly feel overwhelmed about credibility marketing,” says John J. Bowen Jr., founder and CEO of CEG Worldwide.

However, empirical studies of more than 14,000 high-net-worth individuals and more than 10,000 financial advisor coaching interactions led CEG Worldwide researchers to conclude that the highest-performing wealth managers had ten common strategies for implementing effective thought-leadership marketing initiatives to build their credibility.

**Top Ten Actions Used to Implement Credibility Marketing**

Advisor Action	Description
1. Perform a SWOT analysis.	Top advisors are aware of their businesses’ strengths and weaknesses, as well as of the opportunities for and threats to their practices.
2. Write and produce a positioning package.	Elite advisors can detail the benefits their firms provide to members of their respective target niche markets and demonstrate their expertise in addressing those needs.
3. Update Web site regularly.	High-performing advisors have systematic processes in place for updating their Web sites regularly.
4. Research and contact media resources.	Top advisors make themselves aware of the publications and Internet destinations their respective niche markets trust.
5. Write and publish articles and distribute reprints.	High-performing advisors actively publish and distribute reprints of thought-leadership articles.
6. Publish email newsletters.	Most of the surveyed advisors publish regular email newsletters for clients and potential clients.
7. Conduct private client events.	Elite wealth managers are more likely to hold private client events as key marketing tools for enhancing their credibility while bringing in qualified prospects to Discovery Meetings.
8. Write and publish white papers.	Top advisors find the time—and budget for qualified help—to publish professional white papers.

9. Write and publish books.	Top advisors find the time—and budget for qualified help—to publish books about their areas of expertise.
10. Appear on television and/or radio.	Elite advisors receive more invitations for broadcast appearances than do average advisors. This platform reinforces their position as experts among their existing and prospective clients. They rehearse in advance and come to the studio as well prepared as possible.

*Source: CEG Worldwide, LLC, 2010*

“Decide early on who on your team will accomplish each task and *execute it!*” says Bowen. “Once you have a clear plan, move forward without hesitation. You can always refine your efforts later; the important thing is to get started.”

### **About CEG Worldwide, LLC**

CEG Worldwide is passionate about coaching financial advisors and institutions to build a Simple and Elegant Wealth Management Business<sup>SM</sup>. Using state-of-the-art research methodologies and analysis combined with proven strategies and tactics for building highly successful advisory practices, CEG Worldwide provides uniquely powerful insight into what allows elite financial advisors to thrive.

CEG Worldwide delivers fully scalable financial advisor training programs at many of the world’s largest financial institutions. The firm’s proprietary institutional strength intelligence is based upon empirical studies of more than 10,000 advisors and 14,000 high-net-worth individuals. By combining research expertise with pragmatic and proven business experience, CEG Worldwide helps institutions achieve measurable gains in productivity, retention and assets under management and provides advisors with proven business-building strategies and tactics.