Understanding the Social Landscape of Discussion for Financial Advisors

Financial Services

RightMetric

Discussions and conversations around financial advising are happening in three main ways online:

01

Sharing US & Global Based Financial Content

Financial advisor-based content posted to YouTube or as an article based on the terms “asset allocation”, “impact investing” and “fixed income” have seen the most shares across Facebook.

02

Financial Advisors on YouTube

In the USA, there are many YouTube creators posting videos about financial advising and the stock market.

03

Financial Advisor Influencers on Twitter

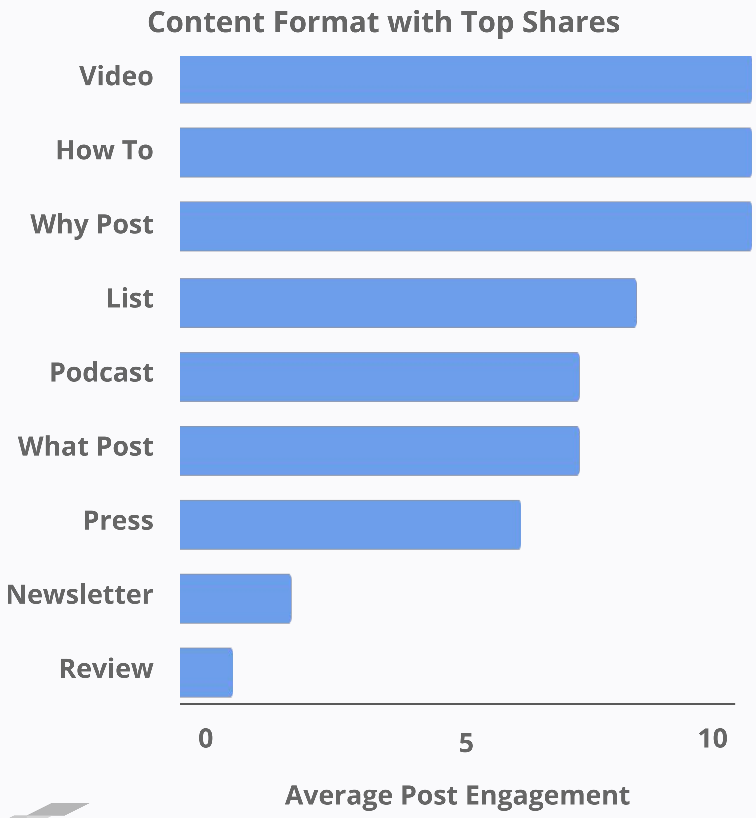
Certified financial advisors in the USA and globally exist on Twitter to discuss advising techniques and frameworks.

04

Financial Advisors on reddit

Micro-subreddits exist where advisors engage in conversations about challenges and strategies that work for obtaining and serving clients.

“Asset allocation” presence online:



Top Questions Asked

- How do Gen Z investors differ in their asset allocation and risk tolerance, compared to previous generations?
- How to maintain your portfolio asset allocation in a DCA strategy?
- What should Asset Allocation be for a Retired Parent?
- What are your go-to asset allocations?
- Why is Robust Allocation a worthwhile problem?

Preferred Topics & Content Length

Highest Engaged Shared Content Length: **3K-10K words**

Asset Allocation Relevant Highly Mentioned Topics

resource allocation
asset management
tactical asset allocation
dynamic asset allocation
etfs
brokerage
risk tolerance
mutual funds

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The top shared media in the USA from September 2020-2021 ranking for “Asset Allocation” includes:

	Facebook Shares	Twitter Shares
Morningstar Asset Allocation Portfolios	294	0
Rethinc. Labs Digital Asset Allocation	62	130
SMArtX Advisory Solutions Expands OCIO Services with Launch of Proprietary Asset Allocation Strategies	114	0
CNBC Pro Talks: Portfolio manager Mary Nicola shares her investment strategy in Asia-Pacific	90	6
7 Asset Allocation Tips in a Low Interest Rate Environment | Portfolio Management | US News	89	1

RightMetric

The top shared media globally from September 2020-2021 ranking for “Asset Allocation” includes:

	Facebook Shares	Twitter Shares
Bursting Asset Allocation Myths #Webinar	1.3K	1
ASSET ALLOCATION STRATEGIES ON GINVEST BY GCASH, #KayaMoGInvestMo - Rex Mendoza	1K	1
The Best Asset Allocation for the Future: ETFs to Consider	721	3
Asset allocation funds can help tame volatility	567	20
Asset allocation, periodic rebalancing crucial to healthy portfolio	468	2

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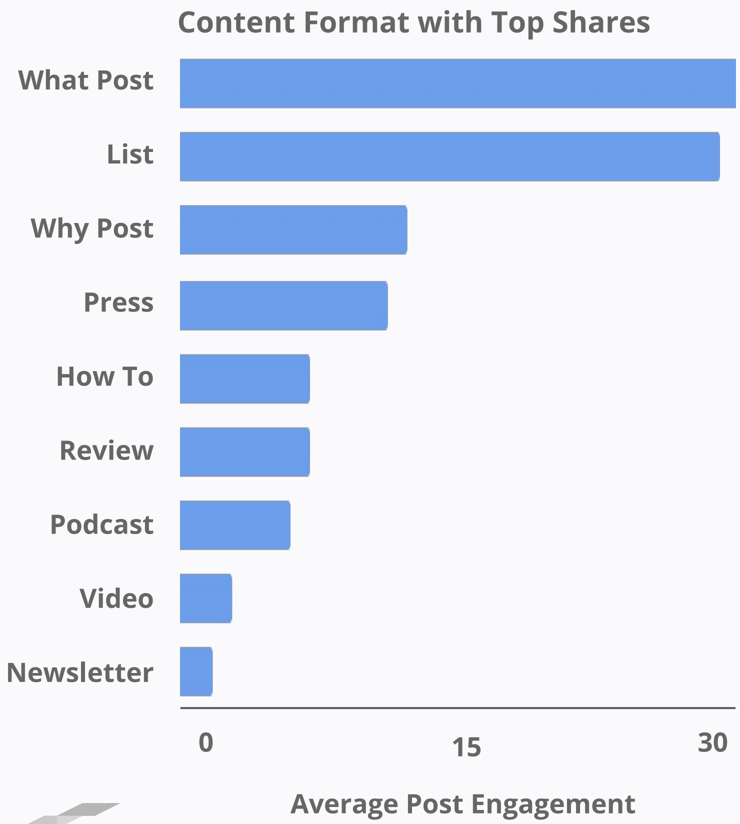
“Impact investing” presence online:



Top Questions Asked

- How does regulation impact corporate digital asset investments?
- How did the inflation during 70s impact corporate dividends?
- Why are impact investing and crypto mutually beneficial?
- What is the impact of fintech on traditional investing?
- What project you are invested in that you think will impact the world in a positive way?

Preferred Topics & Content Length

Highest Engaged Shared Content Length: **2K-3K words**

Asset Allocation Relevant Highly Mentioned Topics

economics of investing	**social impact**
socially responsible investing	**social business**
bond investing	**impact of brexit**
private investment	**angel investors**

RightMetric

The top shared media in the USA from September 2020-2021 ranking for "Impact Investing" includes:

	Facebook Shares	Twitter Shares
What Impact Investors Can Learn from the Organizations They Work with	1.1K	144
Northwestern Mutual starts impact investing fund for Black communities	784	18
ESG investing: Shareholders are starting to demand better	735	44
The Future of Impact Investing, the DeFi Way	0	691
Here's how Biden's presidency could be a boost for impact investing	588	43

RightMetric

The top shared media globally from September 2020-2021 ranking for “Impact Investing” includes:

	Facebook Shares	Twitter Shares
What Impact Investors Can Learn from the Organizations They Work with	1.1K	144
5 of the Best Books on ESG and Impact Investing	817	35
Better ways of choosing and using metrics in evaluation of impact investing	833	13
Northwestern Mutual starts impact investing fund for Black communities	784	18
ESG investing: Shareholders are starting to demand better	735	44

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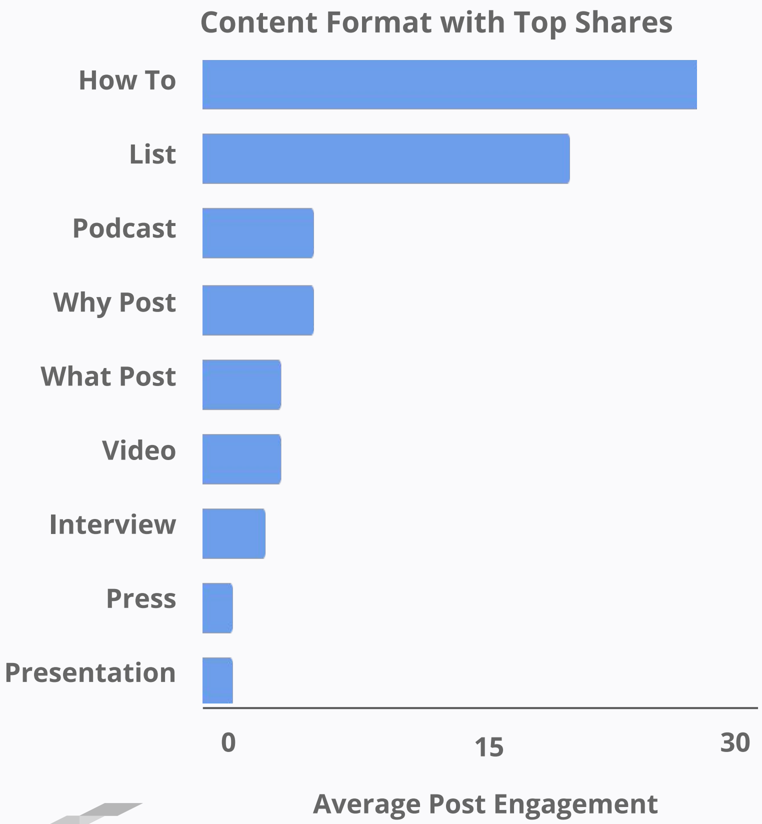
“Fixed income” presence online:



Top Questions Asked

- How to conceptualise Fixed Income Instruments & determine their dividend yields?
- Why is an FRN price equal to par on every reset date?
- What metrics to evaluate a Rates /Fixed Income Macro strategy?
- What explains bond “convenience yields”?
- What % of your household’s gross income goes into mortgage (interest + principal) or rent, insurance?

Preferred Topics & Content Length

Highest Engaged Shared Content Length: **2K-3K words**

Asset Allocation Relevant Highly Mentioned Topics

bond yields	**fixed deposits**
bond & fixed income	**social corporate bonds**
duration	**quantitative finance**
floating rate	**distressed debt**

The top shared media in the USA from September 2020-2021 ranking for "Fixed Income" includes:

	Facebook Shares	Twitter Shares
Fixed Income - Bloomberg	1.4K	2
Institutions Are Swapping Fixed Income With Hedge Funds in Portfolios	466	6
Locked In: How Inflation Impacts Those on Fixed Incomes	359	13
Addressing The New Paradigm In Fixed Income Indexes	307	1
Fixed Income Portfolios	162	0

RightMetric

The top shared media globally from September 2020-2021 ranking for “Fixed Income” includes:

	Facebook Shares	Twitter Shares
AVA GAM FIXED INCOME FUND	2.2K	2
Fixed Income - Bloomberg	1.4K	2
Fixed Income: Check whether your bank deposits are safe	977	133
Zerodha co-founder Nikhil Kamath's True Beacon unveils equity, fixed income fund	534	4
Fixed Income Update	494	0

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While there are many financial advice accounts on YouTube, most are not certified professionals and make content out of self-learning. Financial professionals with a majority audience from the USA include:

Creator:
Stock Moe

Views in the United States:
15.2M

Subscribers:
525K

Click to view

Creator:
Mike Jones Investing

Views in the United States:
1.2M

Subscribers:
44.6K

Click to view

Creator:
JT Wealth

Views in the United States:
993K

Subscribers:
95.8K

Click to view

Creator:
Stock Curry

Views in the United States:
837K

Subscribers:
45.4K

Click to view

RightMetric

The advisors’ videos with highest comments and engagement focus on current events in the stock market as opposed to speaking directly to other advisors on how to manage different client situations and best practices.

Stock Moe:

STOCK MARKET CRASH UPDATE With SBE STOCK MERGER NEWS And CCIV Stock Price Update

Views: **106K**
ER30: **4x**

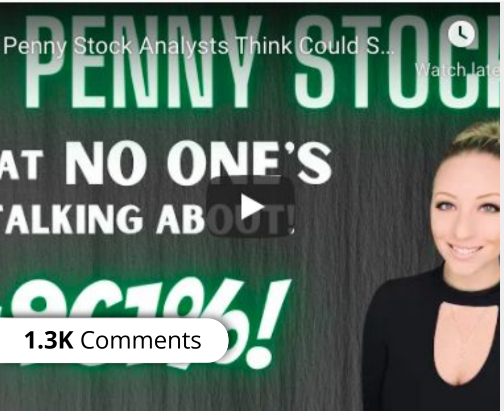
Click to view

Mike Jones Investing:

A Penny Stock That Could 3X!? + 2 Major Announcements - Stocks I’m Buying NOW!

Views: **16.3K**
ER30: **10x**

Click to view



JT Wealth:

The Penny Stock Analysts Think Could SOAR over 1000%!! Buy Now??

Views: **367K**
ER30: **2.6x**

Click to view

Stock Curry:

CCIV, ABML, IDEX, NNDM - Top 10 YouTuber Stock Picks for Tuesday, February 2, 2021

Views: **19.5K**
ER30: **7.1x**

Click to view

Top comments include viewers sharing their personal experiences with trading and investment experimentation:

Nathan Fazekas 7 months ago

I've been invested in OBSV for 7-8 months and the catalyst they need to really sustain price movement is a partnership/buyout. They said they were finalizing one by EOY 2020 and didn't come through. I'm cautiously optimistic and am hoping this is the beginning of a real turnaround, but they need partnership to sustain cash on hand, as it's getting dangerously low.

Bryan Humphreys 7 months ago

Most people pay more attention to the shiniest positions on the graph to the cost of proper diversification, making investing look a lot more difficult. Having monitored my portfolio performance smashing a jaw dropping $280,000 from the last 2 quarters, I have learned why experienced traders make enormous returns from the seemingly unknown markets.

45 REPLY

RightMetric

Viewer comments also address questions viewers have about different assets and financial ideas:

chefbrujo 5 months ago
How much should one expect these mining companies to grow to? Like 1 year, 2, 5, year speculation? Wondering if investing in a $5 mining stock would be worth a long term hold. Like 3-5 years minimum.

nca916 6 months ago
Thank you love your channel. Can you please cover SSFT (Sonasoft)? I think it is a sleeping giant penny stock AI company that can be the next BNGO or NNDM. Thank you!

Adrian Edirisinghe 7 months ago
Can you please do a Video on CTRM??? Thank you for all the Information!!!
REPLY

Viewers tend to comment about references to external factors such as macroeconomics and external sources such as Bloomberg TV and their effects on financial markets.

jnnero123 5 months ago

Also, one of the biggest factors that has helped me achieve success in trading financial markets is to be really in tune with the macro economic climate and trends. I would love to see more content on this part of trading. I could gladly recommend 2 services that are excellent in this area of trading if interested. Thanks again mike.

heather bailey 5 months ago

Watching BTCS now too. They went on Bloombeg TV Saturday and their stocktwits "watchers" went from 780 to 1280 overnight. So Monday or this week, in general, maybe huge for them. Watching closely.

Invest To Live 7 months ago

My concern here is that they missed their last earnings, which is not good for such a small company with such limited operations. Additionally, the market cap at those prices would put this company in the 1.5B range(give/take). That said, nice job on the break down and always always always HEDGE your trades! Watched to the end!

Viewers of financial professionals are also highly likely to engage with content by the following creators:

STOCK UP! with LARRY JONES
# of Subscribers: **386K**

NIO Trending
# of Subscribers: **10.2K**

Chris Sain
# of Subscribers: **468K**

Stealth Wealth Investing
# of Subscribers: **76.1K**

Kenan Grace
# of Subscribers: **339K**

Meet Kevin
# of Subscribers: **1.7M**

Not all suggested creators with audience affinity are certified financial advisors.

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Top certified and active financial advisors on Twitter include a niche group of creators who generally have their own financial podcasts or blogs in addition to their Twitter accounts:

@MichaelKitces
# of Instagram Followers: **62.7K**

@wealth_mgmt
# of Instagram Followers: **53.6K**

@RunnymedeCap
# of Instagram Followers: **7.6K**

@Roger_whitney
# of Instagram Followers: **3.5K**

@SteveSanduski
# of Instagram Followers: **3.1K**

@TracyAGoodwin
# of Instagram Followers: **2.5K**

@finance_therapy
# of Instagram Followers: **2.4K**

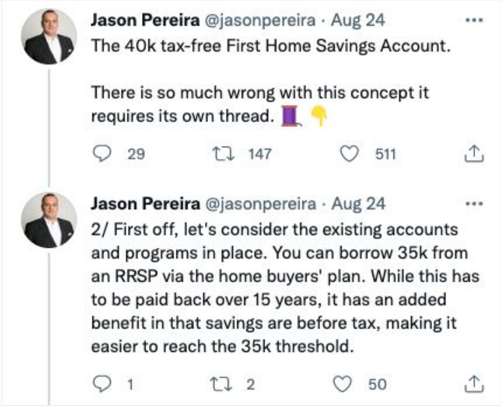
@Kate_Holmes
# of Instagram Followers: **2.1K**

@jlittlechild
# of Instagram Followers: **2.1K**

@jasonpereira
# of Instagram Followers: **1.5K**

RightMetric

Jason Pereira and Michael Kitces saw the top engagement on their tweets from January to August 2021, which range from communicating with clients to understanding asset class risk.



@jasonpereira:

40K tax-free First Home Savings Account

Engagement: **658**

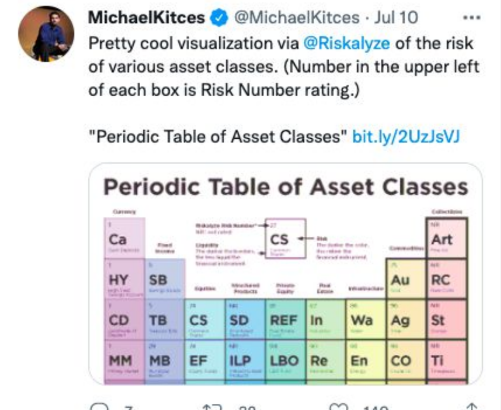
Click to view

@jasonpereira:

Personal Debt Discussion

Engagement: **194**

Click to view



@MichaelKitces:

Asset Class Risk

Engagement: **179**

Click to view

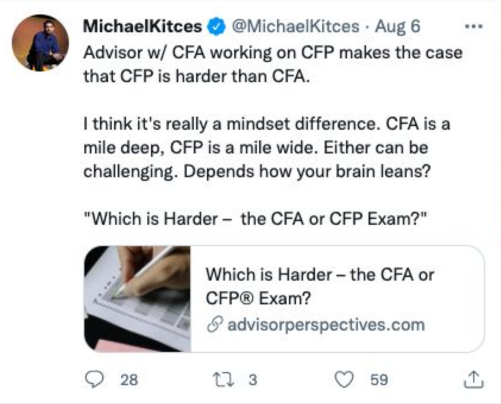
@MichaelKitces:

Communication with Clients

Engagement: **128**

Click to view

Michael Kitces focuses heavily on asking questions to advisors about their training, purpose and diversification of customer portfolios.


MichaelKitces @MichaelKitces · Aug 6
Advisor w/ CFA working on CFP makes the case that CFP is harder than CFA.

I think it's really a mindset difference. CFA is a mile deep, CFP is a mile wide. Either can be challenging. Depends how your brain leans?

"Which is Harder – the CFA or CFP Exam?"

Which is Harder – the CFA or CFP® Exam?
advisorperspectives.com

28 3 59

@MichaelKitces:

Advisor Learning: CFP vs CFA

Engagement: **90**

Click to view


MichaelKitces @MichaelKitces · Jan 22
Dear Asset Managers,
It's not about whether you offer as a mutual fund or ETF. It's that we're not your distribution force anymore. We sit on the client's side of the table now.
Sincerely,
Financial Advisors

"Mutual fund assets decline again in 2020"

@MichaelKitces:

Distribution and Diversification

Engagement: **66**

Click to view


MichaelKitces @MichaelKitces · Feb 20
A Hierarchy Of The Value A Financial Advisor Provides - kitc.es/2518Xgl

3 10 48

@MichaelKitces:

Value and Purpose of Advisors

Engagement: **61**

Click to view


MichaelKitces @MichaelKitces · Apr 2
Why Most Retirees Will Never Draw Down Their Retirement Portfolio - kitc.es/2c89Vku

7 8 35

@MichaelKitces:

Retirement Portfolios

Engagement: **50**

Click to view

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reddit hosts many financial forums where users discuss stocks, crypto and personal investing. Currently, there are three subreddits geared towards financial advisors.

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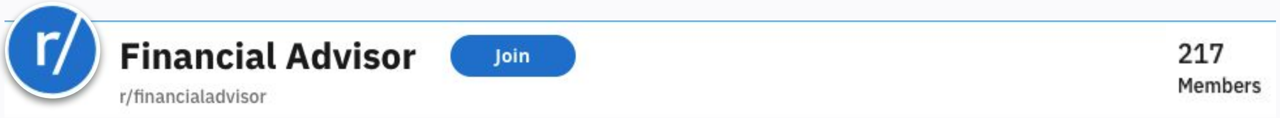

Click to view

Click to view

Top all time threads for these channels focus on how to attract and maintain clients and feature other prospective advisors looking for advice about getting into the industry.

r/FinancialAdvisors

4
Posted by u/dmacturnup 1 year ago

Building a Book

How long did it take you to build up your book to make a "comfortable" amount of money? What size accounts did you start with? have you moved smaller accounts off your book since growing it? what is a manageable number of clients?

0 Comments Award Share Save ...

2
Posted by u/baljeetumang 19 days ago

How to Sell Insurance to High Net-Worth Clients Effectively?

canetwork.com/how-to...

0 Comments Award Share Save ...

2
Posted by u/baljeetumang 3 months ago

Strategies to attract high-net-worth clients

https://canetwork.com/how-are-wealth-managers-attracting-the-ultra-rich/

0 Comments Award Share Save ...

2
Posted by u/atticusfifth 1 year ago

For those who are looking to get into financial advising, what are the firms to look for and the ones to avoid?

I have seen many posts to stay away from certain firms like NWM and AXA. However I believe it would be very helpful to know what firms are actually good for and what the difference between them and bad ones are. Personal experiences are appreciated.

7 Comments Award Share Save ...

r/FinancialAdvisor

4
Posted by u/theofficelover4 3 months ago

Dear FA's... What keeps you up at night?

I'm newly interning at a local FA firm and as I'm considering a career in this industry I'm looking to grasp the good and the bad.

To anyone in this space, whether you're a greenie or an industry veteran, if you can answer any or all of the questions below or provide any other insights that would be amazing.

Questions:

- Why did you join the industry? What initially attracted you?
- If you could picture yourself in your ideal situation in the future, what would that day look like for you? (Big firm, small firm, making X per year, only working X hours, working with X clients, etc.)

5 Comments Award Share Save ...

3
Posted by u/baljeetumang 4 months ago

Why Life Insurance Is Critical For Entrepreneurs

https://canetwork.com/why-a-life-insurance-policy-is-important/

0 Comments Award Share Save ...

3
Posted by u/Rogerw001 10 months ago

If I pass SIE as an individual and now I got a job and the firm want to sponsor for the Series 7. Would that be a problem as I already passed and had an individual account for FINRA instead of letting my firm to support SIE.

????I am confused because I saw the instruction that don't create two account in FINRA

2 Comments Award Share Save ...

r/FinancialAdvisorTips

7
Posted by u/YimyoLa 2 years ago

Sharing My Personal Sales Script

youtu.be/xZCYTj...

0 Comments Award Share Save ...

7
Posted by u/WarringalFS 5 years ago

Weekend Reading for Financial Planners

kitces.com/blog/w...

0 Comments Award Share Save ...

5
Posted by u/chodelas 4 years ago

Are There Any Podcasts Out There for Financial Advisors?

Anyone know of any podcasts geared specifically for financial advisors? There are plenty of financial podcasts out there but the vast majority are for a consumer audience.

5 Comments Award Share Save ...

RightMetric

Key Takeaways

Discussions and conversations around financial advising are happening in three main ways online through sharing content on Facebook and producing content for YouTube and Twitter.

- **Repurposing Content:** When looking at articles and videos posted online, the top channels seeing consistent shares from viewers are Facebook and Twitter.

- **Financial Content Engagement:** When it comes to three financial keywords: asset allocation, impact investing and fixed income, readers are engaging the most with content written in about 2K to 10K words and posted as either a video, answer to a question or how to article. Common questions around these keywords focus on asking for advice on specific client types, looking for precedent in other investments and deeper understanding around financial topics.

- **Financial Content Creation — YouTube:** Certified financial professionals are seeing more success on content related to timely trading news as opposed to talking directly to advisors about their strategies.

- **Financial Content Creation — Twitter:** Certified financial professionals on Twitter have diverse interests often hosting their own financial blogs and podcasts. Twitter content is more directed at talking to advisors about their strategies and bigger picture thinking for clients best interests.

- **Financial Content Creation — reddit:** Top all time threads for these channels focus on how to attract and maintain clients and feature other prospective advisors looking for advice about getting into the industry.