Gleb Troubetskoi: How AdvisorStream Encourages Prospects To Reach Out

March 7, 2018

Gleb joined HollisWealth (formerly Dundee Wealth) 10 years ago and now serves over 50 affluent families who have entrusted him with their financial well-being. He uses a consultative approach to gain a detailed understanding of his clients' deepest values and goals. He employs a customized recommendations designed to address each client's unique needs and goals beyond simply investments.

"Together with my partners, I help affluent individuals and families address their five biggest concerns: preserving their wealth, mitigating taxes, taking care of their heirs, ensuring their assets are not unjustly taken and charitable giving.I help established entrepreneurs get empowered with the right strategies, for their situation, now, so that they can focus on the good things in life, without having to second-guess their financial decisions."

The Problem:
The Creation Of Content Was Time Consuming and Not Personally Branded

I was writing all of my own content, which was very time consuming. With my social media, I was only sharing a couple weekly posts on my LinkedIn profile. In fact, because of this inconsistency, I got very little in return. I was not satisfied with my results, especially because I spent hours of hard work and valuable time I could have put towards my clients. I just could not find a way to manage my social media and create high quality content without sacrificing a couple hours of my day.

It's also important to note that I have many clients that work in a lot of different industries all with different financial goals. This was an extra challenge I was burdened with because I had to create content that was tailored to the specific industry my clients and prospects worked in. Writing and sourcing relevant content that would appeal to my clients was an extremely time consuming and difficult process.

Another dilemma I was faced with was the fact that my content was not branded to myself. I would often lose touch of warm prospects because the content I was creating did not market myself as a financial advisor. I would lose the business of many warm prospects because they were not knowledgeable on the services I offer. It was rather disappointing because my efforts would untimately go unnoticed.

The Solution:

Weekly Branded Newsletter That Saves Time & Encourages Clients to Reach Out

I signed up for AdvisorStream four months ago and have been extremely satisfied with my decision.

AdvisorStream has allowed me to schedule posts that are relevant to my business and also to my network. The feature that I really like is the ability to easily filter through different topics. As I mentioned before, finding and creating content within different industries was a labor intensive process. However, AdvisorStream made this process an effortless and uncomplicated experience. I can now quickly choose from a wide variety of topics, ranging from lifestyle to marker related topics. Specifically, I have been seeing great return in sharing lifestyle content. It really allows me to break up the subject matter, as well as keep people informed of what is occurring outside the financial markets. I feel like this sets me apart from other financial advisors, who only share financial related or product specific content.

Thanks to my new strategy, I have noticed my daily posts receive consistent clicks and engagement. I can share content without having to spend hours of research, and most importantly, the content is branded to myself. Because of this, I recently received a new lead who I successfully converted into a client from social media, which has never happened before! I've already seen a huge return from using their service.

Another way AdvisorStream helps grow my business is with the weekly newsletter. They curate the entire newsletter for me, and then I can edit it and add my own personal touched if I want to. However, I usually just send out what AdvisorStream creates for me because it's top quality. This has saved me hours of work and I no longer have to write nearly as much of my own content. The weekly newsletter has been a great way to keep in touch with my clients and prospects.

Essentially, I used my weekly newsletter to reinforce my value with clients and prospects. In fact, I had a prospective client who was dragging his feet for months, and after putting him on my newsletter list and sending updates, I was able to close a $650,000 account.

I accredit AdvisorStream for this accomplishment.