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The Social Advisor (Social Media Secrets Of The Financial Industry Book 1)



Synopsis

Financial Social Media expert Amy McIlwain reveals cutting-edge social media secrets that are rapidly changing the marketing landscape as we know it. Discover how the industry's elite advisors are leveraging this new form of communication and watching their business soar.

Book Information

File Size: 2744 KB

Print Length: 168 pages

Simultaneous Device Usage: Unlimited

Publication Date: January 29, 2013

Sold by: Digital Services LLC

Language: English

ASIN: B00B8D8J1K

Text-to-Speech: Enabled

X-Ray: Not Enabled

Word Wise: Enabled

Lending: Not Enabled

Screen Reader: Supported

Enhanced Typesetting: Enabled

Best Sellers Rank: #562,563 Paid in Kindle Store (See Top 100 Paid in Kindle Store) #22

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Customer Reviews

This book is an extremely quick read, and written in a way that is easily understandable for those with very little digital acumen. If you are a financial professional with zero knowledge of social media, this book gives a good broad perspective of the major social media outlets as well as some fundamental digital marketing concepts that may or may not be relevant to your online strategy. It falls short on the compliance section (in my opinion) - nothing much to distinguish strategies between B/D's or RIA's, which is really what I was looking for, but that's not to say it won't be useful for those who operate in less regulated environments.

Social media is a resource for advisors that has about a 5% effective utilization rate, so this work

helps fill a yawning gap. The writing is uneven and not all of the advice is useful, but there is not much competition. You probably need to read this if you are serious about social, but do not let it substitute for thinking.

It was interesting to get a perspective of a non-financial person. Thankfully, much of the book could still be relevant in 2016 if only for a small segment of advisors. Worth reading as a complement to more current and less industry specific writings on the social media landscape.

As a social media marketing executive, this is one of the best book that I recommend to advisors. Amy McIlwain is one of the most knowledgeable people in the industry. Definitely a win win.

Amy does a great job explaining the basics of social media and why Advisors should begin to put the effort into using it. Her writing is engaging. Amy handles all major platforms and describes how and why they should be part of an integrated marketing plan. One of the highlights are examples of Advisors and CFP's that are using social media. When in doubt, imitate. I would recommend this to any Advisor not using social media.

Provides practical information & ideas for registered investment advisors, including social media policy statement suggestions. Particularly appreciate that it provides input from several different industry-involved sources.

We were thrilled to see this get published and flattered to have contributed our compliance research and knowledge to Chapter Nine. Amy has done a wonderful job of illustrating the steps to getting engaged and making the time and effort spent on social meaningful to your online identity and your business overall.

Covered a lot of ground with great tips, resources and easy to implement ideas. This will motivate you to get started or enhance your Social Media program

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