

Build stronger, more profitable relationships



*In 2016, 47% of buyers said they viewed three to five pieces of content before engaging with a sales representative.**

Connect to your customers through content.

When it comes to finances, no one wants to make financial decisions that will hurt them or lose money. That's why providing educational content at the right time through Truebridge MoneyWise Financial Education is a perfect solution to solve your customers' needs. It allows you to connect to your customers in a new way.

Consumers will buy from the resources that are there when they need the information.

However, it takes more than just putting content on a website. You have to take content to where your customers are, instead of letting it sit idle, waiting to be found.

With your content in place, you need to actively connect your content with your customers.

*78% of marketers in the financial industry report using content marketing. Of those who use content marketing, 25% consider themselves to be effective.***

MoneyWise Financial Success Tips

Simply put, the problem with many content marketing programs is that content is not sufficiently promoted! Content that sits idle on your website does not help you connect with your customers or increase your ability to cross-sell financial products they need.

That's why Truebridge created MoneyWise Financial Success Tips, an email-based content distribution platform designed to connect your customers with your content. It's based on the three Ps of content marketing: Promote, Promote, Promote.

Build Stronger Relationships

We've created an effective turnkey marketing tool to help you build stronger relationships through responsible cross-selling.



Promote content through our fully branded and custom designed e-newsletters. Simply drop into your email provider and send!



Let your customers pick their content with our customized email campaigns. They select topics that interest them, and the rest is automatically done by us!

Not only will MoneyWise Financial Success Tips drive more traffic to your Education Center and reinforce your expert advisor position, but it also drives traffic into your sales pipeline. Your customers are rewarded with financial tips delivered at the right time, through the right channel.

Learn more about MoneyWise Financial Success Tips

by visiting truebridge.com/demo.



*2016 Hubspot Demand Generation Report

** Excerpt from the article "Changing Times: Finance Marketing Evolves With Content" by Ann Gynn, Content Marketing Institute, August 2015.