

Financial Marketing Playbook:

A Complete Guide to Attracting &
Engaging Clients

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Marketing in the financial industry comes with unique challenges — but with the right strategy, you can attract and engage your ideal clients.

This resource gives you everything you need to get started — from defining your ideal client profile to choosing the right channels and building your own content calendar.

Get the strategy and tools you need to market with confidence!

STEP 1: DETERMINE YOUR IDEAL CUSTOMER

YOUR MARKETING EFFORTS WILL ONLY WORK IF YOU'RE talking to the right people. Here's how to pinpoint your ideal customer.

1 Identify the Problem Only You Can Solve

- What challenges or pain points does your service address?
- Why should customers choose you over competitors?

2 Analyze Your Best Customers

- Who are your most loyal customers?
- What do they have in common (industry, income, job title, etc.)?

3 Research Your Market

- Who needs your product/service the most?
- Where do they spend time online?
- What influences their buying decisions?

4 Build an Ideal Customer Profile (ICP)

Ideal Customer Profile Template

An Ideal Customer Profile (ICP) is a detailed description of the type of customer who would benefit most from your product or service. Think of it as the bullseye on your client-base dartboard.

It includes key demographic, psychographic, and behavioral traits that define the best-fit customers for your business.

Fill out the template below to determine your ICP:

BASIC DEMOGRAPHICS:

Age Range	
Gender:	
Ethnicity:	
Location:	
Income Level:	
Education Level:	
Industry & Job Title:	



PSYCHOGRAPHICS:

Primary Goals (e.g. financial stability):	
Biggest Challenges (e.g. market volatility):	
Prevalent Fears (e.g. missed financial opportunities):	
Driving Motivators (e.g. maximizing returns):	
Decision Influences (e.g. testimonials):	

BEHAVIORAL TRAITS:

Preferred Social Media Platforms:	
Biggest Challenges (ex: market volatility):	
Content They Engage With Most:	

STEP 2: CHOOSING THE RIGHT MARKETING CHANNELS

It's easy to think more is better when it comes to marketing, but spreading yourself thin across too many channels can water down your efforts and make it harder to gauge what's working.

Each marketing channel has its own strengths and weaknesses, though. Take the time to consider which platforms connect best with your ICP ([see step 1](#)).

MARKETING CHANNEL		PROS	CONS
SOCIAL MEDIA	LINKEDIN	Best for B2B marketing and reaching decision-makers (71% of users are in high-income brackets)	Requires consistent engagement and thought leadership
	FACEBOOK / META	Broadest reach (2.9 billion users), great for local businesses, ideal for middle-aged audiences (Typical age: 25-54)	Organic reach is low — ads are almost necessary
	INSTAGRAM	Best for visual storytelling and engaging younger demographics (78% of 18-29 year olds use Instagram)	Requires frequent posting, Algorithm favors video content
	TWITTER/X	Great for brand authority and real-time updates, 63% of users are 35-65 years old	Short content lifespan, engagement can be inconsistent
	TIKTOK	Engages younger audiences (62% of users are under 30), high organic reach	Requires video creation and trend participation
	YOUTUBE	Second-largest search engine, long-form content has longevity	Video production can be time-intensive
EMAIL MARKETING		High ROI (on average \$36 return for every \$1 spent), direct audience access	Must build and maintain a quality email list
SEO (SEARCH ENGINE OPTIMIZATION)		Free organic traffic, 68% of online experiences start with a search engine	Requires time to rank, ongoing optimization is necessary
PPC (GOOGLE ADS, FACEBOOK ADS, ETC.)		Fast results, highly targeted	Can be expensive, requires optimization and testing
REFERRAL MARKETING		Low-cost, high-trust (90% of people trust recommendations from others)	Time-consuming, requires travel and preparation
NETWORKING & EVENTS		High-trust relationship-building, great for service-based businesses	Hard to scale, depends on customer satisfaction

STEP 3: CREATE A CONTENT PLAN

A MARKETING FUNNEL REPRESENTS YOUR CUSTOMER'S JOURNEY WITH YOUR BRAND.

Your content should cater to different stages to move your ideal customer from the top of the funnel to the bottom.

TOP OF FUNNEL (TOFU) – AWARENESS

Attract potential customers with educational and engaging content.

- SEO blog posts
- Social media posts with industry trends
- Infographics and short-form videos
- Free guides and

MIDDLE OF FUNNEL (MOFU) – CONSIDERATION

Establish credibility with potential leads while they consider options.

- Webinars and live Q&As
- Customer testimonials
- Email sequences
- Product comparison guides

BOTTOM OF FUNNEL (BOFU) – ACQUISITION

Encouraging conversions with strong calls to action.

- Free trials or product demos
- Limited-time offers and discounts
- Personalized sales emails

STEP 4: USE A CONTENT CALENDAR

A content calendar is a game-changer when it comes to staying organized and consistent with your marketing. It helps you plan ahead and ensure you always have fresh content ready to go.

By scheduling posts in advance, you can avoid last-minute stress and confirm your messaging stays on track. Plus, it allows you to align content with key dates, promotions, or campaigns, making your overall approach more strategic and cohesive.

Before you [create your own Content Calendar](#), take a look at this two-week example below to get an idea of how your channels, funnel, and campaigns can come together to make an impact.

Date to Publish	Content Type	Funnel Stage (Top, Middle, Bottom)	Campaign Attribution	Channel/Network	Copy/Media Link
Feb 3	Blog Post	Top (Awareness)	Update dropdown	Website + LinkedIn + Instagram + Facebook	Meta Caption: Tired of doing it all yourself? Learn how to delegate effectively with BELAY! Read more! [BLOG LINK]
Feb 5	Video Testimonial	Middle (Consideration)	Update dropdown	Email List + Youtube + LinkedIn	Meta Caption: See how [Client Name] transformed their financial situation with our help! Hear his journey to financial freedom. [Link to Video Testimonial] [Link to Email Copy]
Feb 6	eBook	Bottom (Acquisition)	Update dropdown	Website + Email List	[Link to email copy] [Link to Resource]
Feb 7	Webinar Invitation	Middle (Consideration)	Update dropdown	Email List + LinkedIn + Website	Meta Caption: Join us for a FREE live webinar on the best investment strategies for 2025! Learn how to grow your wealth with insights from industry experts. Sign up today!
Feb 10	Infographic	Top (Awareness)	Update dropdown	Instagram + Facebook + X/Twitter + LinkedIn	Meta Caption: Get your finances in shape with our easy-to-follow budgeting tips. Start building a strong financial foundation today! [Link to Infographic]
Feb 12	FAQ Video	Middle (Consideration)	Update dropdown	Youtube + Instagram + Website	Meta Caption: Got questions about financial planning? Watch our FAQ video for answers to your most common queries. [Link to FAQ Video]
Feb 13	Client Success Story	Middle (Consideration)	Update dropdown	Instagram + LinkedIn + Email List	Meta Caption: We helped [Client Name] save thousands with smart tax strategies. Check out their success story and discover how we can optimize your taxes too. [Link to Case Study]
Feb 14	Free Resource/ Valentine's Giveaway	Bottom (Acquisition)	Update dropdown	Website + Email List	[Link to email copy] [Link to Resource]

BELAY is Here to Help

Never worry about what to say or how to say it again with a BELAY Marketing Assistant.

Marketing is essential, but that doesn't mean you have to take it on yourself. If these steps feel like too much of a time commitment right now, it might be the perfect time to delegate.

A BELAY Marketing Assistant can take it off your plate — from targeted content creation to performance tracking to social media management — all while you focus on what you do best.

READY FOR MARKETING THAT GETS RESULTS?

LET'S TALK!

