

How to Market Your RIA Using an Expertise Approach



1



CHOOSE A NICHE

Choose a narrowly defined market who could benefit from your unique expertise.



2



POSITION YOUR FIRM

Develop a message and service offering that solves your niche's financial challenges.



3



LEVERAGE YOUR NETWORK

Reach out to existing contacts within your niche to get your foot in the door of the niche community.



4



CREATE CONTENT

Develop written, visual, or audio content that speaks to the needs and aspirations of your niche.



5



ENGAGE THE COMMUNITY

Find and integrate into your niche community, engage with its members, and share your content.



6



BECOME A THOUGHT LEADER

Establish credibility, achieve awareness, and be accepted as an expert with your niche.