NEWS

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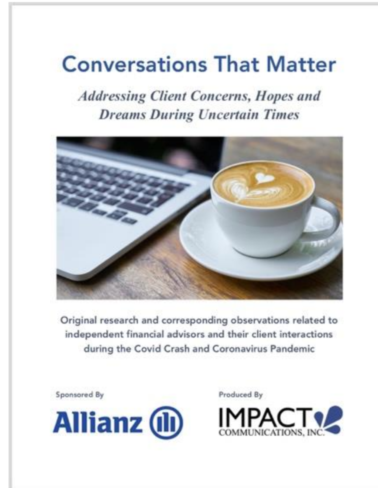

New Survey Explores How Financial Advisors Have Responded to the Covid Crisis and Coronavirus Crash

Results will be revealed during November 20th webinar "Conversations That Matter: Addressing Client Concerns, Hopes and Dreams During Uncertain Times"

KANSAS CITY [November 16, 2020] – In October 2020, Impact Communications, a leading marketing and PR strategy firm focused exclusively on the financial advisory industry, conducted a survey on *Conversations That Matter: Addressing Client Concerns, Hopes and Dreams During Uncertain Times.* The survey asked hundreds of independent financial advisors to weigh in on how they have adjusted to the challenges posed by the Covid Crisis and Coronavirus Crash.

"The survey was an opportunity for independent financial advisors to weigh in on 2020's pandemic realities and share their stories on how they adjusted when the COVID-19 lockdowns, market turbulence and business realities became apparent," said Marie Swift, president and CEO of Impact Communications. "From the survey we've also learned where advisors have gone the extra mile, what their clients valued most, and whether or not they are getting new business. The survey has given us important insights into the state of today's financial advisors and how they are adjusting their businesses in these uncertain times."

WEBINAR VIA RIA CHANNEL

The results of the survey will be revealed during a webinar via RIAChannel.com on Friday, November 20, 2020, at 1:00 pm ET. The *Conversations That Matter* survey results, which will be presented by Swift, will be followed by comments and observations from three panelists:

- Bob Veres of Inside Information / Insider's Forum
- Shannon Stone of DHR Investment Counsel, LTD
- Heather Kelly of Allianz Life Insurance Company of North America

Swift and the panelists will provide insights on how financial advisors can:

- Build demand for their services and expertise
- Bridge communication gaps with current and prospective clients
- Shift their marketing efforts to align with changes in consumer sentiment and client perceptions
- Prepare their clients for future lifestyle, market and economic shocks
- Consider new and innovative solutions to help their clients

Click here to sign up to attend the Conversations That Matter webinar:
https://www.riachannel.com/conversations-that-matter-addressing-client-concerns-hopes-and-dreams-during-uncertain-times-allianz-life-11-20-20/

BONUS VIDEO AVAILABLE NOW

Marie Swift interviewed Heather Kelly during the early stages of the *Conversations That Matter* project. Click here to watch the Swift Chat with Heather Kelly.

SPECIAL REPORT AVAILABILITY

Following the webinar on November 20, 2020, all registrants will receive a corresponding special report, in which Swift provides additional color and comments from dozens of financial industry experts, behavioral finance academics and independent financial advisors. Readers will glean fresh insights from experts such as Dr. Meir Statman, Dr. Sonya Lutter, Carl Richards, Bob Veres and Joel Bruckenstein, as well as tales-from-the-trenches stories from independent financial advisors such as Bonnie Sewell, Melanie Housden, John Enright, Shannon Stone, Carolyn McClanahan and more.

A free download link will be provided to anyone interested on Monday, November, 23, 2020. Watch for Swift's blog post on www.MarieSwift.com and/or follow @MarieSwift on social media for a link to the *Conversations That Matter* special report.

ABOUT IMPACT COMMUNICATIONS, INC.

Founded in 1993 by Marie Swift, who prior to Impact Communications was Director of Corporate Communications for a nationally-known wealth management firm and regional office for one of the largest independent broker/dealers in the country, Impact Communications works with a select group of fintech companies, financial institutions such as custodians and independent broker/dealers, RIA networks and membership organizations, OSJs, allied consulting entities, wealth management firms and independent advisors. Private coaching, on-camera training, branding and customized websites, content creation, and personalized media strategies enable Impact clients to reach their overarching goals. A prolific writer and respected consultant in the financial planning profession, Swift has appeared on NPR and numerous video interviews. Her quotes and articles have been published by *Forbes*, *MarketWatch*, *Barron's* and dozens of financial services trade publications. She profiles interesting people in the financial services industry on her blog, *Best Practices in the Financial*

Services Industry, and in her new *Swift Chat* video interview series. For more information about Impact Communication and its services, please visit www.ImpactCommunications.org.