

NEWS

For Immediate Release

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Snappy Kraken to Host Webinar on What RIAs Need to Know About the New SEC Marketing Rules

Award-winning MarTech platform will also partner with SmartAdvisor on webinar covering 2021 marketing strategies for financial advisors

ORMOND BEACH, FL (January 7, 2021) – [Snappy Kraken](#), a MarTech company focused on helping financial professionals automate their marketing and business processes, recently announced that they will be hosting a live webinar covering what RIAs need to know about the new SEC marketing rules. During the live webcast, which will be held on Friday, January 15th at 4pm ET and is open for registration now, two respected compliance experts will clarify what financial advisors can and can't do under the new rules.

Snappy Kraken will also discuss massive opportunities to improve how advisors can generate leads and win clients, as well as major pitfalls to avoid. Among other topics, Leila Shaver of [MyRIALawyer](#) and Max Schatzow of [Stark & Stark](#), attorneys who specialize in serving RIAs, will discuss testimonials and case studies, paying for referrals, changes to advertising rules, required disclosures, ADV updates, and more. As a bonus, all registrants will receive a written guide summarizing the most important rule changes that RIAs need to know.

“The SEC's new rule on Investment Adviser Marketing opens up important opportunities for advisors,” said Robert Sofia, CEO and co-founder of Snappy Kraken. “Those who act to update their marketing, particularly as it relates to incorporating testimonials, will have a significant competitive advantage. An advisor's primary marketing goal should be to transform cold prospects into warm leads as quickly as possible. This is accomplished by exposing them to as many trust and credibility-building signals as possible. Testimonials, proof of historical performance, expert credentials, and genuine thought leadership all help to accomplish this purpose. Until this new rule, the 1961 advertising rule and the

1979 cash solicitation rule held advisors to an antiquated marketing standard that did not keep up with modern, digital marketing best practices. Finally, advisors will be able to market their businesses in the ways consumers are accustomed to interacting with brands.”

Financial advisors, journalists, and other interested parties can register for the webinar at <https://offers.snappykraken.com/new-rules/>.

JOINT WEBINAR WITH SMARTASSET ON 2021 MARKETING STRATEGIES

Snappy Kraken will also be teaming up with [SmartAdvisor](#) by [SmartAsset](#) to present a joint webinar on 2021 marketing strategies for financial advisors, empowering advisors for a growth-focused new year. The webinar, taking place Tuesday, January 26th at 3pm ET, will focus on fueling predictable growth in the new year, including how to captivate and get the attention of ideal prospects, the steps to enroll prospects into a compelling “outreach system”, how advisors should adjust their outreach depending on channel and stage, and ways to position themselves for more business-building opportunities and conversations. Hosts Robert Sofia from Snappy Kraken and Christopher Sonzogni from SmartAdvisor will also discuss key lead sources and provide templates for reaching out effectively.



“We have a handful of members who use both Snappy Kraken and SmartAdvisor as part of their marketing strategy,” said Robert Sofia. “It’s impressive how both of our offerings amplify each other.”

“It’s an honor to serve this industry and talk marketing strategy alongside Snappy Kraken,” said Christopher Sonzogni, Director of Advisor Marketing at SmartAdvisor. “If you look at SmartAdvisor as the ‘match-maker’ for advisors and their ideal clients, then Snappy Kraken is the one who helps make sure the relationship develops productively and lasts a long time.”

Financial advisors, journalists, and other interested parties can register for the webinar at <https://offers.snappykraken.com/connect/>.

FIRST SEASON OF “BEHIND THE CAMPAIGN” VIDEO SERIES

Snappy Kraken recently wrapped up the first season of their [“Behind the Campaign” video series](#), where they enlisted the firm’s marketing experts to teach the strategies and tactics behind key campaigns. By pulling back the proverbial curtain and revealing



some of their marketing secrets, Snappy Kraken aimed to help industry professionals learn the "why and how" behind a creative and data-driven process that generates meaningful results.

In the final episode of the season, which can be [viewed here](#), they discussed their longstanding campaign series, the Visual Insights Newsletter, which earned Snappy Kraken a 2019 Wealthie award for Social Media Leadership.

"It's one thing to tell an advisor about a campaign and how they can launch it," said Chief Creative Officer, Patrice Kelly. "It's another to show them why it fits into their strategy, and how even the smallest details of their campaign were scrutinized by a team of professionals ranging from copywriters and developers to researchers and designers. It's been a great experience to participate in these episodes. Not enough marketing providers show the 'why' behind the strategy."

All episodes of the "Behind the Campaign" video series can be found on the [Snappy Kraken blog](#).

ABOUT SNAPPY KRAKEN

Snappy Kraken provides marketing automation, online advertising, and bold, unique marketing for financial professionals. Each automated campaign on the Snappy Kraken platform is focused on achieving specific and trackable goals that grow business. All Snappy Kraken subscribers are assigned to a personal Success Specialist who helps them set up, manage, and optimize their use of the platform through monthly performance check-ins. To learn more about Snappy Kraken's solutions for financial advisers, including white-labeled enterprise solutions, and to use the new and enhanced tools recently announced, visit www.SnappyKraken.com.

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