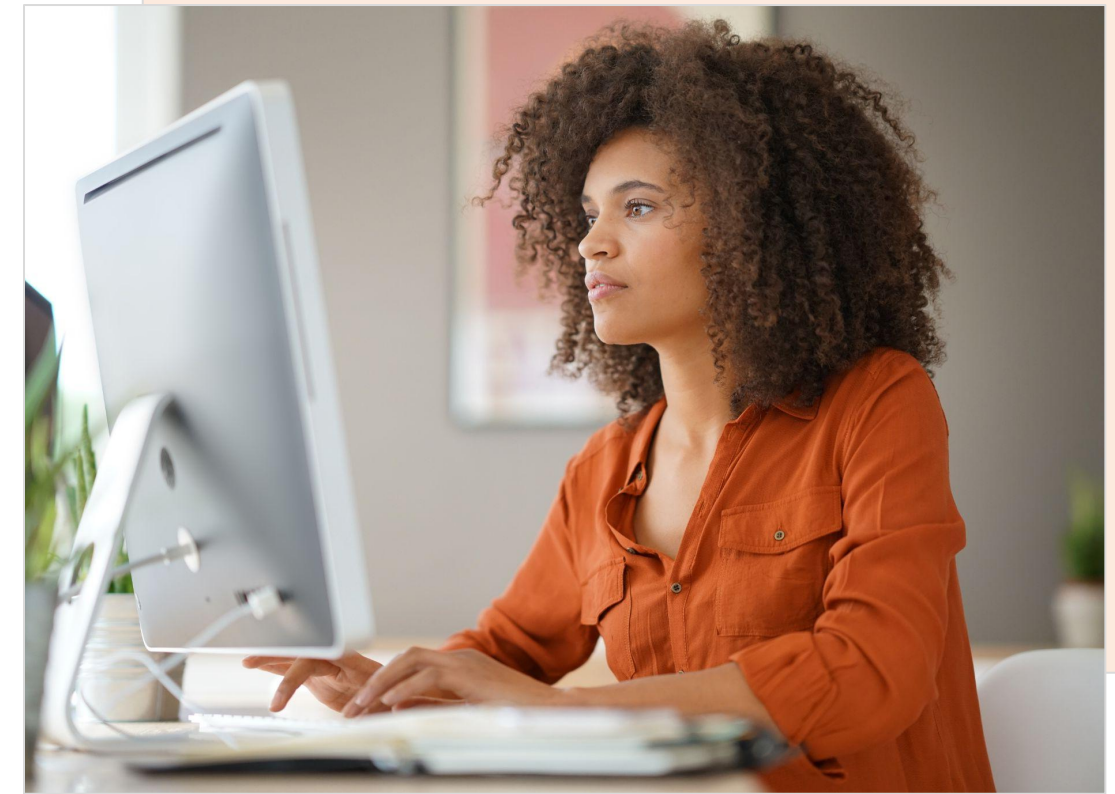


The attention economy in Wealth Management

Capture mindshare, build trust, drive differentiation and results at scale.

What we are hearing from leaders across Wealth Management

Wealth management must keep pace with a rapidly changing market, gain trust and break through to both investors and employees.



CHALLENGE 01

Keeping pace in a shifting market

Firms must explain changes fast, clearly, and at scale in a dynamic market.

- Markets shift daily
- Products are complex
- Constant regulatory and legislative changes

CHALLENGE 02

Building trust remotely

In a field built on credibility and expertise, trust isn't just important — it's everything.

- Radical transparency
- Visible leadership
- Consistency

CHALLENGE 03

Breaking through the noise

There's an overwhelming amount of noise — advisors must guide clients to make smart choices.

- Time is tight
- Simplicity is key
- Clarity drives action

Why “always on” snackable video is essential for Wealth Management

From investors to employees, short-form video drives impact and your peers know it.



01 A shift is happening

Meet your audience where they are.

If snackable video isn't part of how you engage, attract, or inform — you're missing where the market has already gone.

02 Short. Real. Actionable.

Snackable video works because it's short, real, and easy to act on.

It grabs attention quickly, builds trust through authenticity, and guides people to what's next.

03 Scale brings the payoff

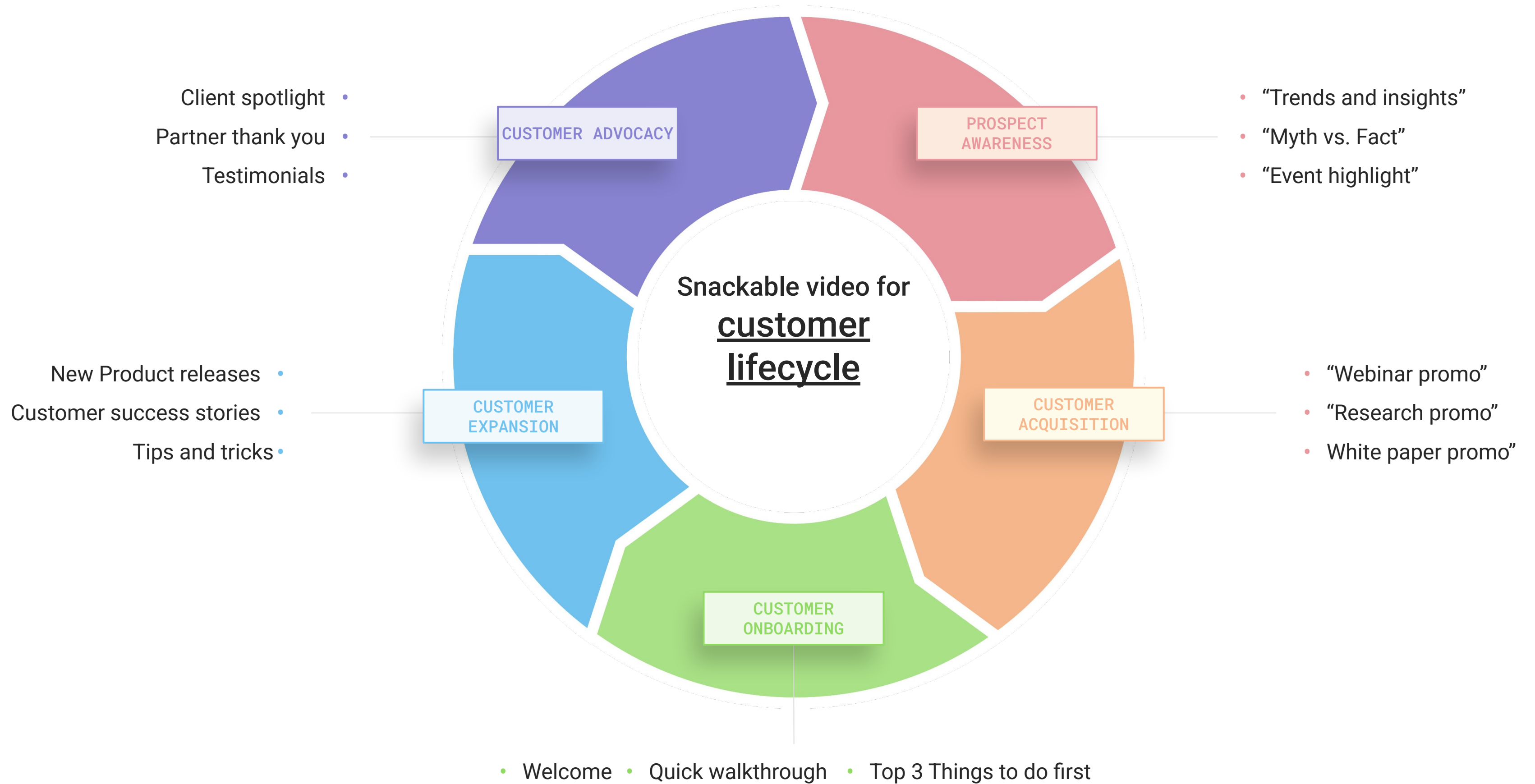
Scale brings the real payoff — because it turns individual actions into enterprise-wide impact.

From organic reach to deeper trust, every layer of scale multiplies results.

04 Your peers are doing it

Your peers are already doing it — empowering teams company-wide to create short-form, onbrand and compliant video to attract prospects, customer and employees and get them to go deeper.

It's fast, relatable, and built for how people engage today.





SECTION 01

A shift is happening

63% of clients considered short-form social video expertise when buying services. (Marketing Week)



80% of job seekers would prefer to see a video to better understand the opportunity (Monster)



94% of employees prefer video microlearning over long training sessions (eLearning Industry)



<div>↑ REVENUE</div> <div>Engage investors with expert insights</div>	<div>↑ RECRUITMENT</div> <div>Attract top wealth managers and advisors to hire</div>	<div>↑ LEARNING & DEVELOPMENT</div> <div>Increase team productivity with microlearning</div>
---	--	--

63% of B2B buyers use social video from industry experts to inform buying decisions (Marketing Week)



96% of consumers prefer videos less than 2 minutes vs. longer formats (Digital Marketing Institute)



94% of buyers feel video is a good way to build confidence during the sales process (Wyzowl)



↑ LEADS

Attract prospects with expert insights

↑ ENGAGEMENT

Keep prospects hooked with quick insights

↑ SALES VELOCITY

Move prospects down the funnel by building trust

80% of job seekers would prefer to see a video to better understand the opportunity (Monster)



76% of employees feel more connected with leadership through video communications (Brightcove)



94% of employees prefer video microlearning over long training sessions (eLearning Industry)



↑ RECRUITMENT

Attract talent, increase volume and quality of applications

↑ EMPLOYEE COMMUNICATIONS

Strengthen employee connection to leadership

↑ LEARNING & DEVELOPMENT

Increase team productivity with microlearning

SECTION 02

Short. Real. Actionable.

01 Make it short. Optimize for mobile.

02 Make it real. Make it authentic.

03 Make it measurable. Add a CTA.

You have 8 seconds. That's how long today's digital audience takes to decide what is worth their time.

01 Keep videos short

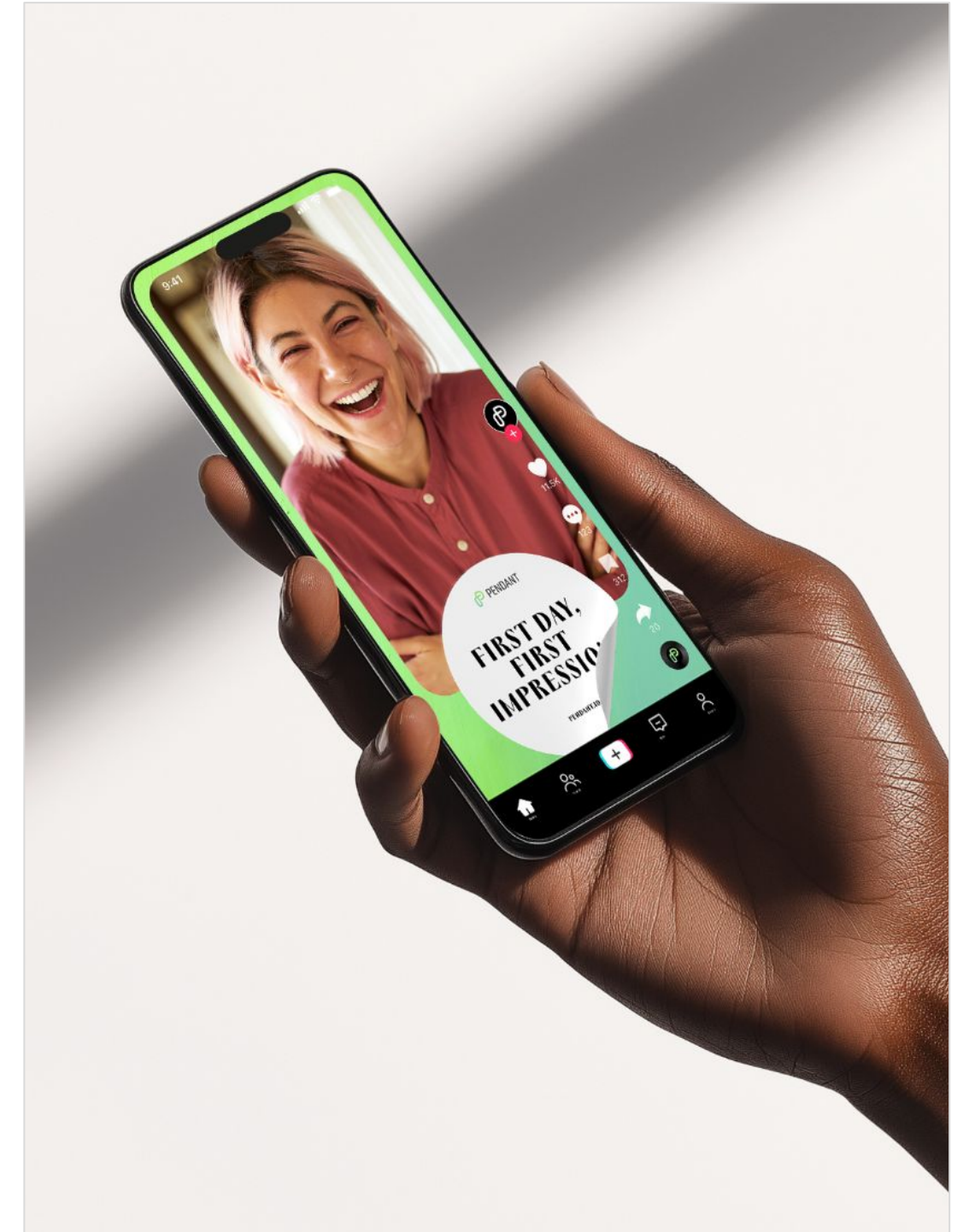
Drive deeper engagement with *concise* content

- Short-form video (under 2 mins) gets **2.5X more engagement** ([Sprout Social](#))
- Videos under 60 seconds have the highest completion rates at **81%** ([Firework](#))

02 Optimize for mobile viewing

Meet investors and employees where *they* are

- **75% of video views** are on mobile, make it mobile first. ([Vidico](#))
- Vertical video fits the scroll and drives up to **20% more conversions** ([Google](#))



01 Make it short. Optimize for mobile.

02 Make it real. Make it authentic.

03 Make it measurable. Add a CTA.

***People trust people* more than brands. Overly scripted, polished videos often feel corporate and inauthentic.**

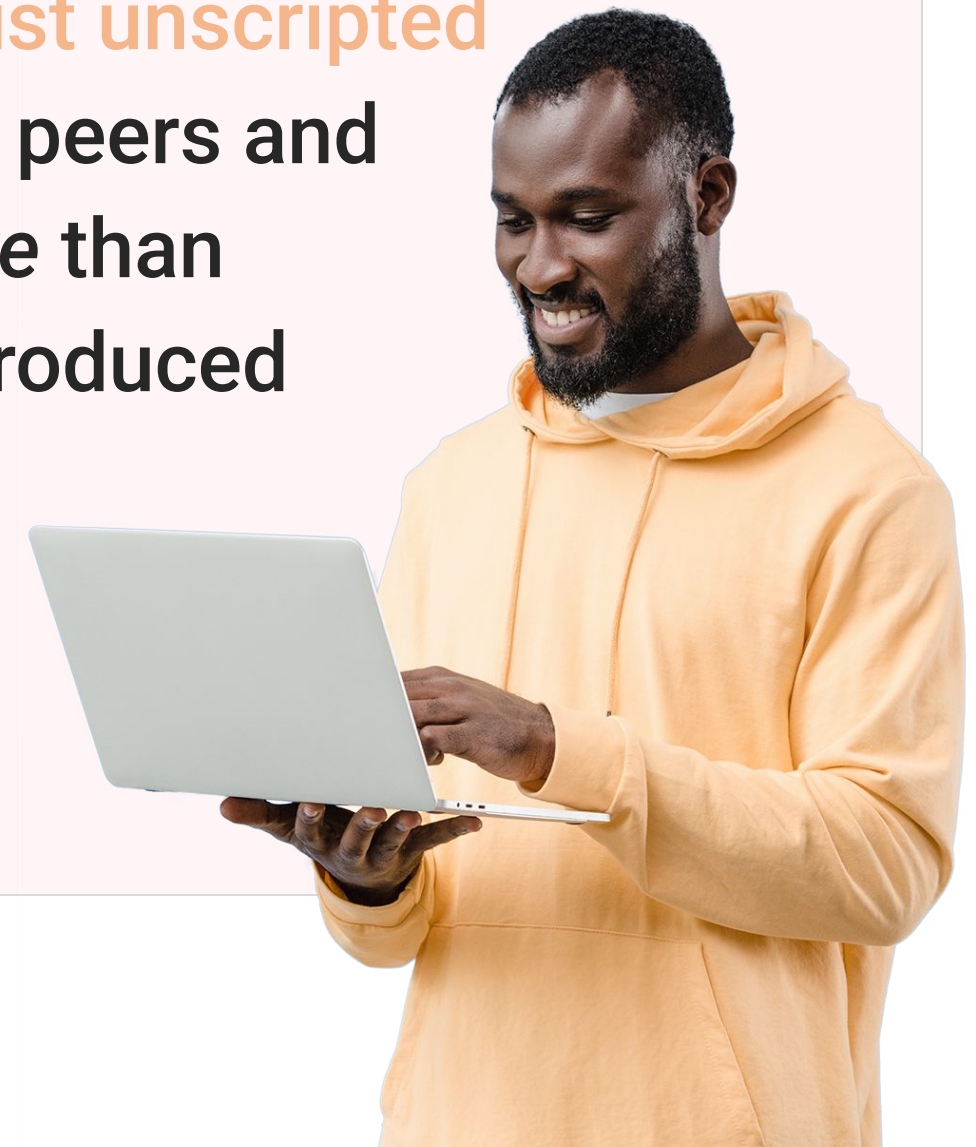
01 87% of viewers prefer real people on video vs. avatars or animation ([TechSmith](#))

02 Humans make a first impression in **50 milliseconds** ([Google Research](#))

03 Authentic voices spark emotional connection and humanize the message

“Viewers trust unscripted videos from peers and experts *more* than corporate-produced content.”

— Edelman



Short-form video pulls audiences in and motivates them to take the *next step*

Investor engagement and conversions

- Read the article
- Register for the webinar
- Book a meeting with your wealth manager

Talent attraction and applications

- Check out the firm
- Learn about the opportunity
- Apply for the job

Employee productivity and retention

- Read the newsletter
- Watch the all-hands
- Complete the training module

SHORT VIDEOS + CTA:

161%↑ conversions ([Wisernotify](#))

VIDEO JOB POSTS:

34%↑ applications ([Career Builder](#))

EMPLOYEE STORIES & TESTIMONIALS:

24X↑ engagement ([PostBeyond](#))

VIDEO COMMS, ONBOARDING & TRAINING:

82%↑ retention, 70%↑ productivity ([Brandon Hall Group](#))

SECTION 03

Scale brings the payoff

The drivers that deliver results at scale.



THE DRIVERS:

Algorithm favoritism

Platforms boost short-form, frequent video content — scaling output means greater organic reach and visibility.

Employee advocacy

Employees sharing video content 10–20x amplifies brand reach and authenticity, especially on social.

Widespread adoption

When creation is easy and on-brand, employees across departments contribute — increasing volume, diversity, and relevance of messaging.

THE RESULTS:

More reach

Organic visibility and impressions grow exponentially.

More engagement

Authentic voices drive deeper connection.







More conversions

From more job applications, more meetings booked, more webinar registrations to fully engaged employees and customers

More end business value

More top talent, more new customers, faster onboarding, expansion and retention.

SCALE YOUR REACH WITH ENHANCED DISCOVERABILITY AND INCREASED VISIBILITY

SEO	SOCIAL	LINKEDIN
<div>Enhanced discoverability</div> <div> Websites with video are 50X more likely to rank on page one (Vidico)</div> <div> Adding video = 41%+ in organic search traffic (Sagapixel)</div>	<div>Increased visibility</div> <div> Snackable video drives 1.4X more engagement (Adweek)</div> <div> Higher engagement = better algorithm visibility</div>	<div>Amplified reach</div> <div> LinkedIn is a crucial platform for reaching financial service consumers</div> <div> LinkedIn users are 20X more likely to share video content (LinkedIn)</div>

Turn your wealth managers into trusted advocates

Vastly expanded reach 01

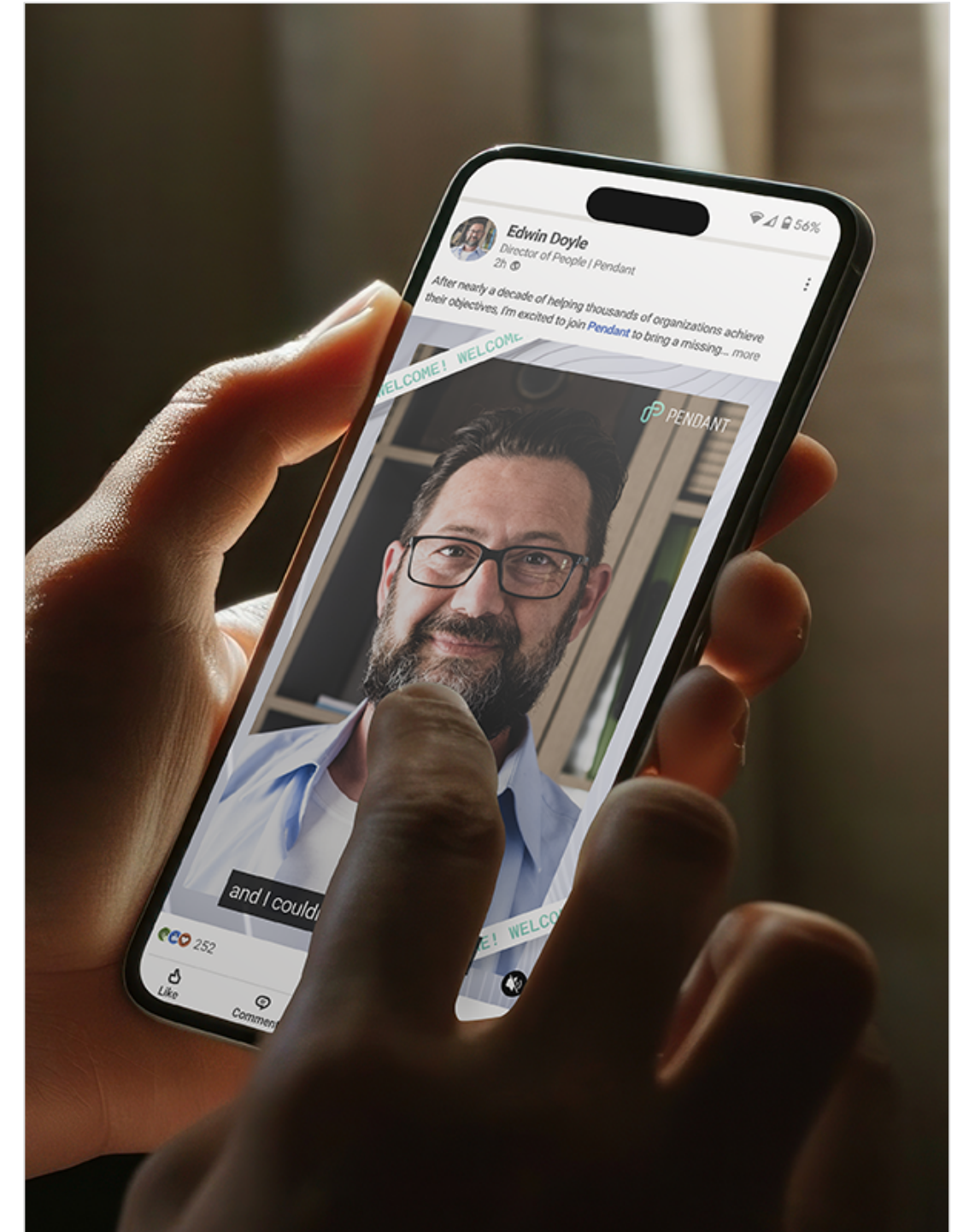
Employee advocacy increases your message's reach by **561%** ([EveryoneSocial](#))

Exponentially higher engagement 02

Content shared by employees receives **8X** more engagement ([Ambassify](#))

Unmatched trust & credibility 03

People are **3X** more likely to trust information about your firm when shared by advisors, analysts, and staff ([Edelman](#))



SCALE IS THE MULTIPLIER

ADOPTION

+

REACH

+

ENGAGEMENT

+

COMPLETION RATES

=

CUSTOMER LIFECYCLE

- ↑ Brand awareness (%)
- ↑ Prospect interest (%)
- ↑ Webinar registrants (%)
- ↑ Faster sales cycles (%)
- ↑ Engaged customers (%)
- ↑ Increased expansion (%)
- ↑ Higher customer retention rates (%)

EMPLOYEE LIFECYCLE

- ↑ Employer brand awareness (%)
- ↑ Top talent interest (%)
- ↑ Job applicants (%)
- ↑ Faster onboarding (%)
- ↑ Engaged employees (%)
- ↑ Increased productivity (%)
- ↑ Higher employee retention rates (%)

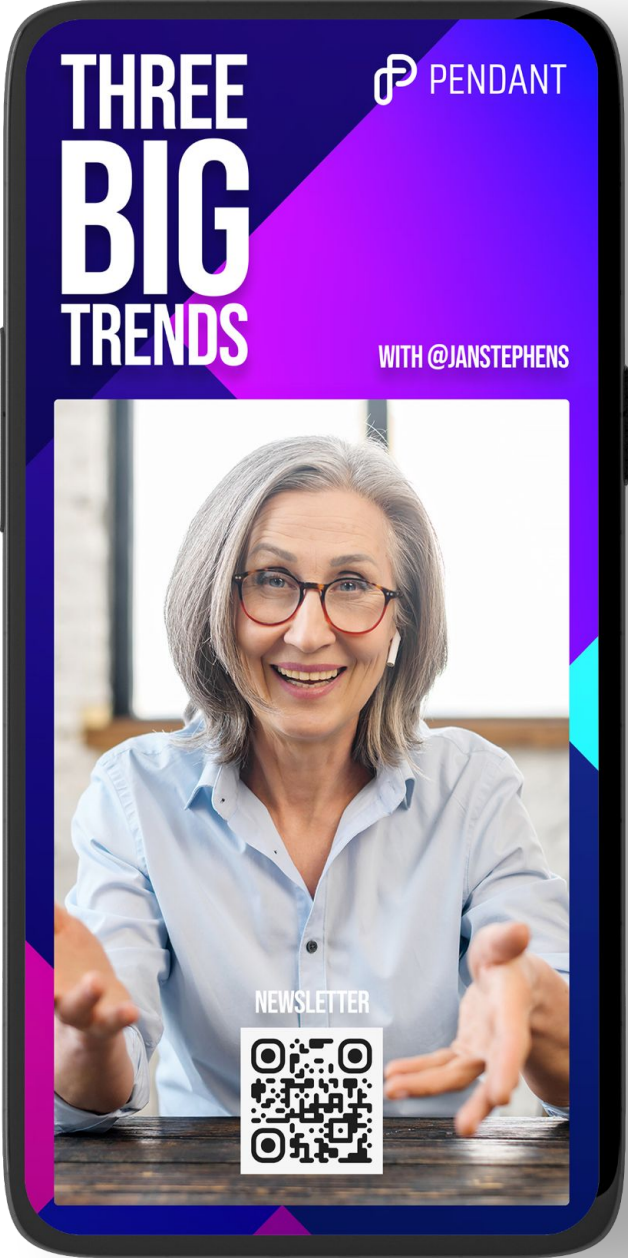
SECTION 04

Driving desired behaviors

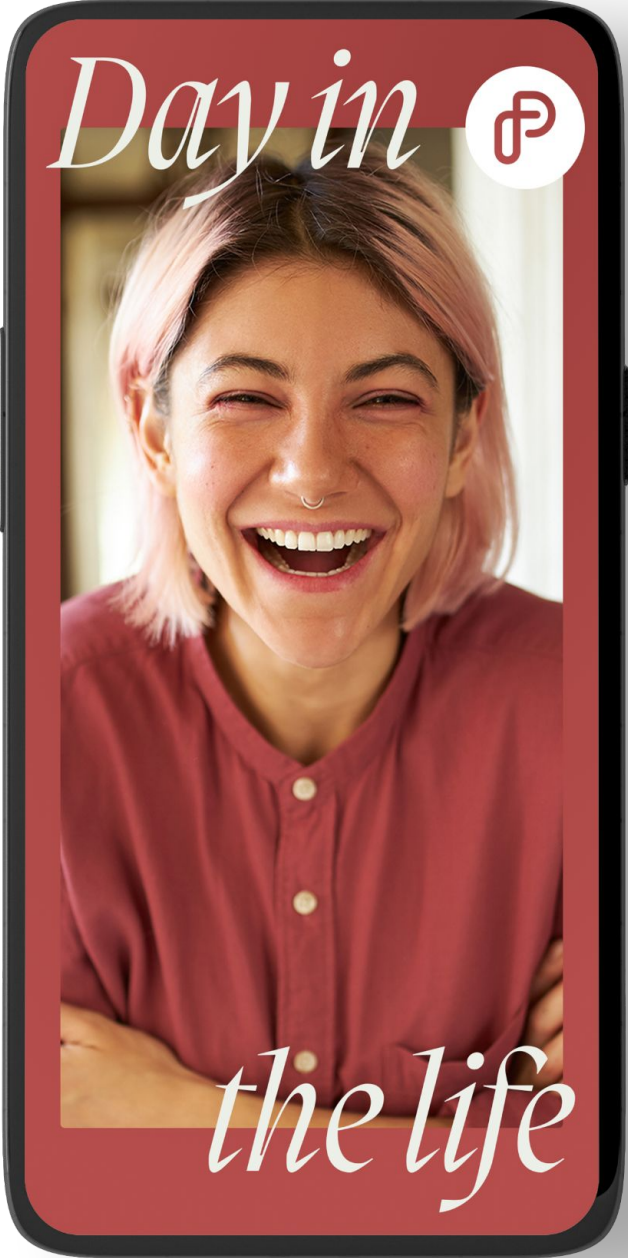
DESIRED BEHAVIORS AFTER WATCHING SNACKABLE VIDEO

INVESTOR BEHAVIORS	EMPLOYEE BEHAVIORS
<p>New investor (<i>Decision</i> → <i>Action</i>)</p> <ul style="list-style-type: none">• Views on market trend videos• Clicks on advisor intro videos• Newsletter sign-ups• Comparison of products/funds• Follow-up meeting requests• Engagement with investor testimonials	<p>New talent (<i>Decision</i> → <i>Action</i>)</p> <ul style="list-style-type: none">• Watch video job listings• Browse careers page• Faster onboarding• Ready to serve investors sooner
<p>Existing investor (<i>Engagement</i> → <i>Retention</i> → <i>Advocacy</i>)</p> <ul style="list-style-type: none">• View market recaps• Click on portfolio overviews• Increased client referrals• Attend investor webinars• NPS survey completions	<p>Existing employee (<i>Engagement</i> → <i>Retention</i> → <i>Advocacy</i>)</p> <ul style="list-style-type: none">• Regular microlearning videos• Internal mobility interest• Peer-to-peer recognition• Pulse survey completion• Increased talent referrals

LIFECYCLE :	SNACKABLE EXAMPLES (30-60 SEC.)	MEASURABLE BEHAVIORS
Attract	<ul style="list-style-type: none">“Today’s Market in a Minute”“3 Big Trends We’re Watching”	Market insights blog, newsletter sign-up, follow on social or YouTube
Educate & consider	<ul style="list-style-type: none">“What This Strategy Aims to Do (in Plain English)”“How This Fund Compares”	Investment overview, fact sheet, fund comparison tool, white paper download
Convert	<ul style="list-style-type: none">“3 Reasons Investors Are Choosing This Solution”“Investor Story: Real Results”	Advisor consultation, portfolio review, account application, lead form
Onboard	<ul style="list-style-type: none">“What to Expect in Your First 30 Days”“Set Up Your Account in Under a Minute”	Digital onboarding, welcome series, platform walkthrough, first funding guide
Engage & retain	<ul style="list-style-type: none">“Your Portfolio Performance Snapshot”“Manager Commentary: What Changed This Quarter”	Personalized dashboard, quarterly updates, webinar registration, mobile app login
Advocate	<ul style="list-style-type: none">“Why I Refer My Advisor”“How One Client Reached Their Financial Goal”	Referral program, testimonial feature, client story submission, NPS or satisfaction survey



LIFECYCLE :	SNACKABLE EXAMPLES (30-60 SEC.)	MEASURABLE BEHAVIORS
Attract	<ul style="list-style-type: none">• “Why I chose this firm to grow my book”• “A day in the life of an advisor here”	Careers page, advisor recruiting campaigns, referral program, job application portal
Onboard	<ul style="list-style-type: none">• “3 things to expect in your first week”• “Meet your onboarding partner”	Digital onboarding guide, compliance checklist, team intros, internal community
Engage	<ul style="list-style-type: none">• “This month in markets + firm news”• Video from a leader on performance updates	Internal newsletter, all-hands replay, business update sessions
Develop	<ul style="list-style-type: none">• “3 ways to succeed in your first 30 days”• “Meet your onboarding coach”	Onboarding portal, mentorship match, product + platform training checklist
Retain & celebrate	<ul style="list-style-type: none">• “This month’s market update from leadership”• “Advisor spotlight of the month”	Recognition platform, internal awards, pulse surveys, end-of-year engagement content, sales enablement tools



SECTION 05

Your peers are creating
snackable video and *driving*
results at scale

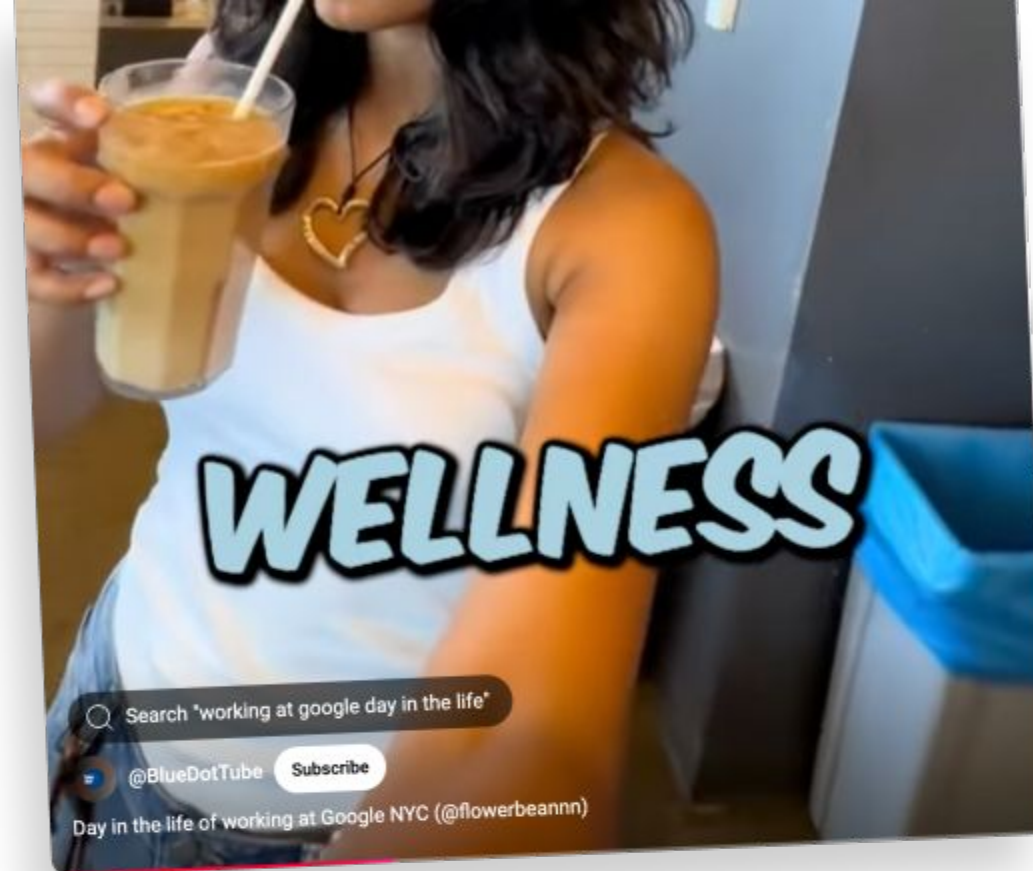
CISCO
Cisco Learning Network Community Event

Design by Design: Your Path to Designing Cisco Security Infrastructure Certification

Estimate and start your annuity benefit seamlessly, with

START MY RETIREMENT

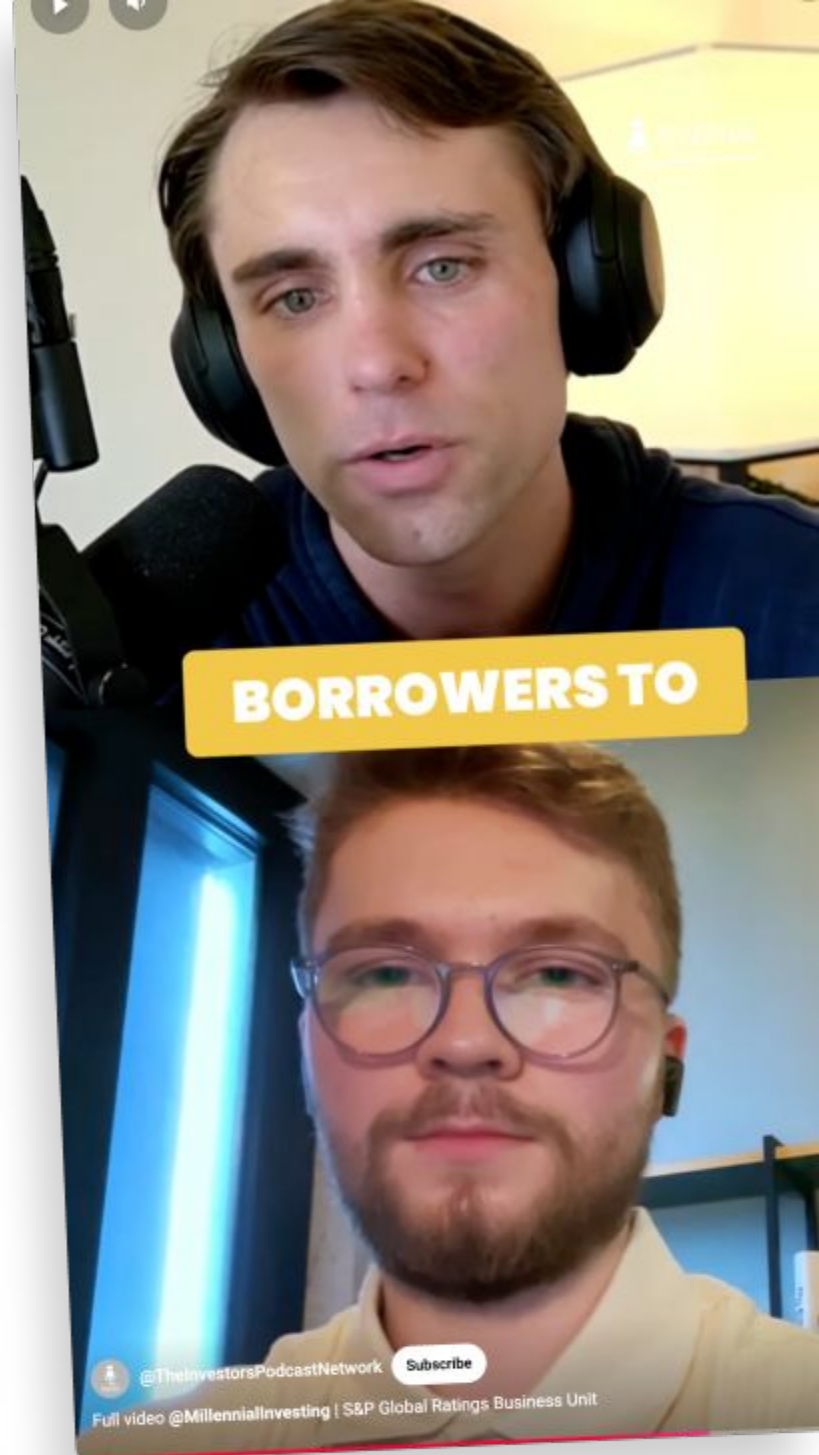
Prudential

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BORROWERS TO

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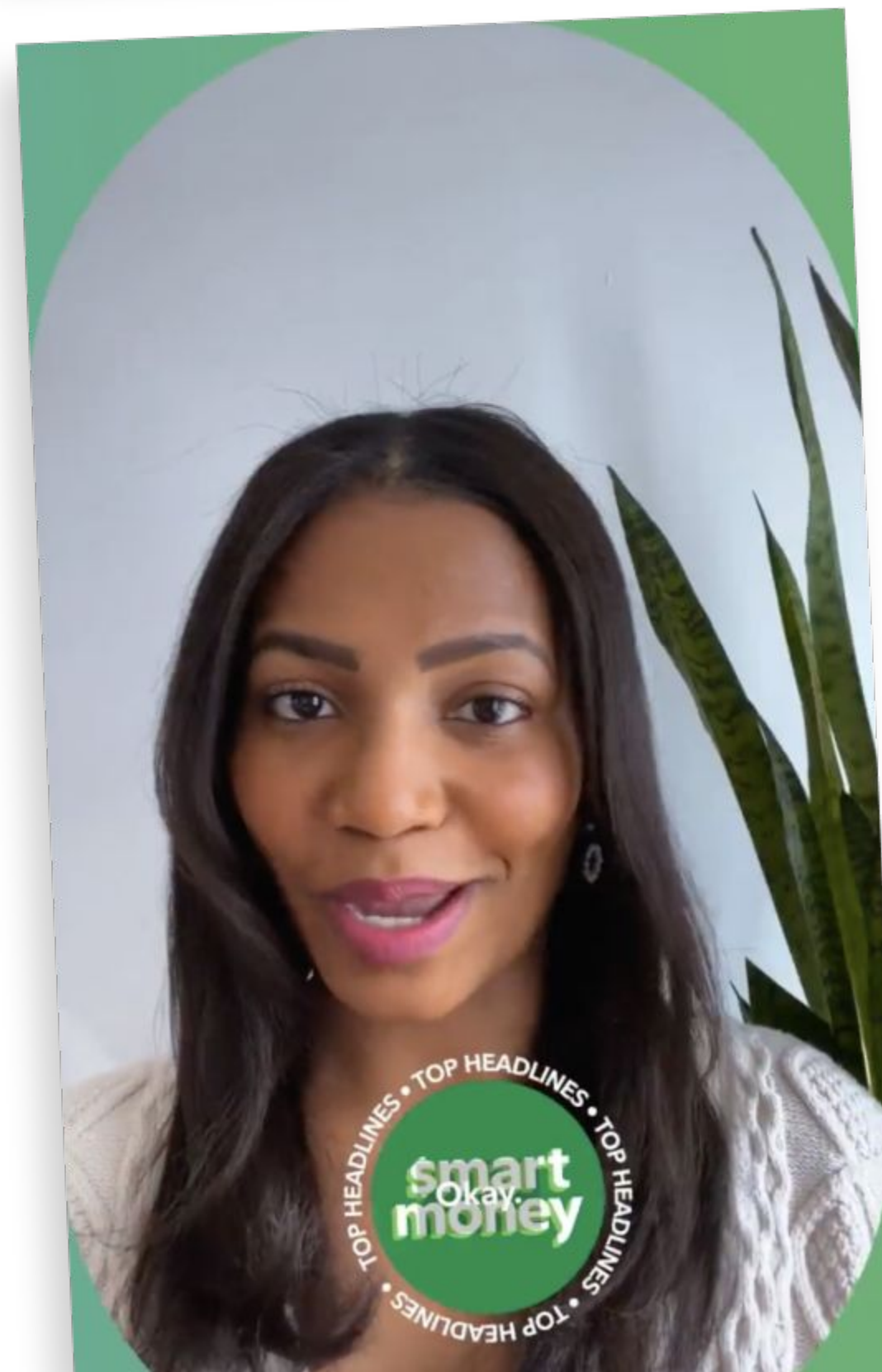
Full video @MillennialInvesting | S&P Global Ratings Business Unit

Join the Slido discussion



Cisco Security Infrastructure Certification

SDG Resources



TOP HEADLINES • TOP HEADLINES • TOP HEADLINES • TOP HEADLINES • TOP HEADLINES

smart money

Okay.

ORACLE



There's so much data when you do many, many slice CT scan.



Complete Model My Retirement before Start My Retirement.

PART 2: WHAT COULD ECONOMIC POLICY LOOK LIKE UNDER A DEMOCRATIC ADMINISTRATION IN 2025?

PGIM
GLOBAL ASSET MANAGEMENT

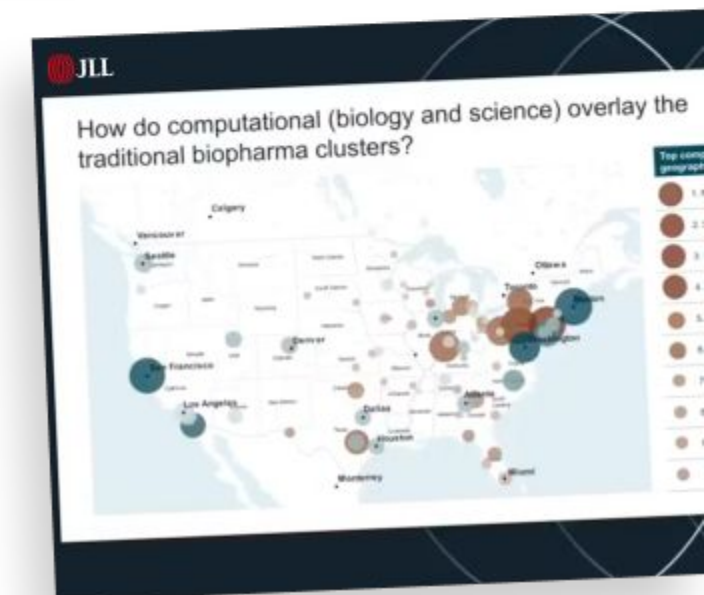


Tom Porcelli
Chief U.S. Economist, PGIM Fixed Income

James Sonme
Head of Government Affairs, PGIM

JLL

How do computational (biology and science) overlay the traditional biopharma clusters?



Top computing geography

Check our Latest Account Executive

valentia

FINANCIAL TIPS SERIES:



Fidelity Investments produced a series of concise videos offering practical financial advice, such as budgeting tips. These short clips were designed to provide immediate value to viewers, encouraging better financial habits.

ADVISOR SUCCESS STORIES:



FS Investments interviewed Jackie Larson, Senior Vice President of the Westside Group at RBC Wealth Management – and Forbes Top Advisor – on turning her talent for connecting with people into an award-winning practice.

INDUSTRY THOUGHT LEADERSHIP:



Monument Wealth Management demystifies private equity for consumers and weighs the level of diversification investors might expect by investing in similar asset classes in snackable YouTube Short clips.

MARKET TRENDS:



UBS shares short, video insights on hedge fund strategies that capitalize on market dispersion amid potential volatility in its UBS Trending series, to build relationships with key stakeholders at scale.

COMMUNITY INITIATIVE HIGHLIGHTS:



Citibank utilized short videos to showcase involvement in community projects and charitable events to humanize the brand and demonstrate commitment to social responsibility.

EMPLOYEE STORIES:



Wells Fargo interviewed several team members across the company to showcase their company culture and work environment. These authentic narratives provided potential applicants with genuine insights into the employee experience.

This is how your peers are getting results

Top Wealth Management Firms use these strategies to create snackable videos that engage users and drive real business value.



Keeping it short

Videos under 2 min = **2.5X more engagement** ([Sprout Social](#))



Being authentic

87% prefer real people over avatars or animation ([TechSmith](#))



Going vertical

75% watch on mobile ([Vidico](#)) — vertical gets 10–20% more conversions ([Google](#))



Adding a CTA

81% completion rate = more CTA views & clicks ([Firework](#))



Using captions

92% watch with sound off — captions boost reach & SEO ([Verizon & Publicis](#))



Empowering employees

Employee shares = **10X reach, 8X engagement** ([Ambassify](#))

It's time to build your *video-first* culture

EXAMPLES / APPENDIX

More snackable video stories in Wealth Management

Merrill’s advisor video studio

Empowering advisors to sell with snackable video

- Merrill (Bank of America Wealth Management) invested in a virtual video studio for financial advisors.
- Enabled on-demand recording of short, polished videos — market updates, investor greetings, and more.
- Result: More personalized, more frequent outreach, deepening client relationships.
- Part of a larger trend: Equipping teams to create snackable video at scale.

At Merrill, video became a *selling tool* — not just a marketing asset.

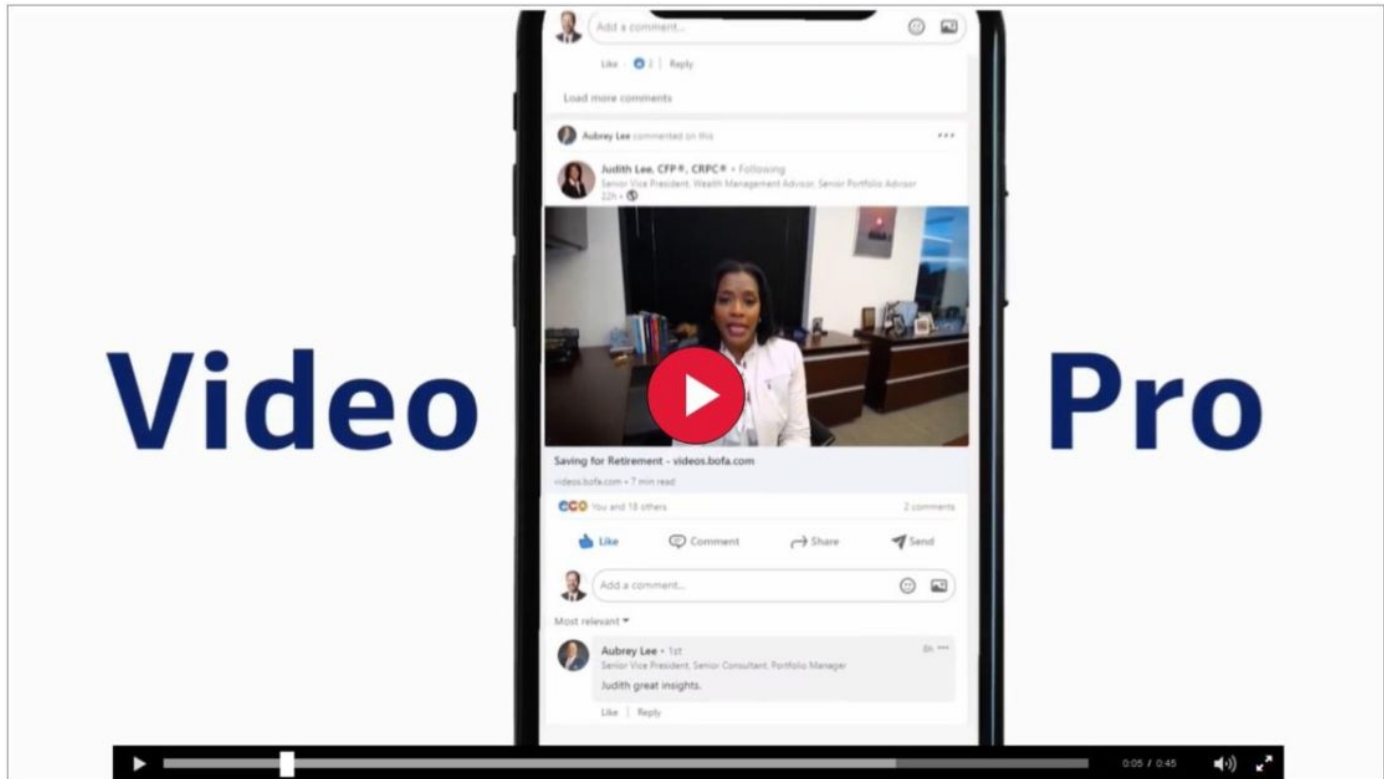


February 14, 2023 at 9:00 AM Eastern

Merrill Launches Virtual Video Studio for Financial Advisors

Merrill Video Pro Offers a High-Tech, High-Touch Way for Advisors to Engage Clients and Prospects

NEW YORK, NY – Today, Merrill announced the launch of Merrill Video Pro, a virtual video studio for financial advisors to create content and connect with clients and prospects at scale.



Modernizing advisor connections with clients and prospects with Merrill Video Pro

“Video is an engaging medium for advisors to connect in a modern, simple way,” said Kirstin Hill, Chief Operating Officer at Merrill Wealth

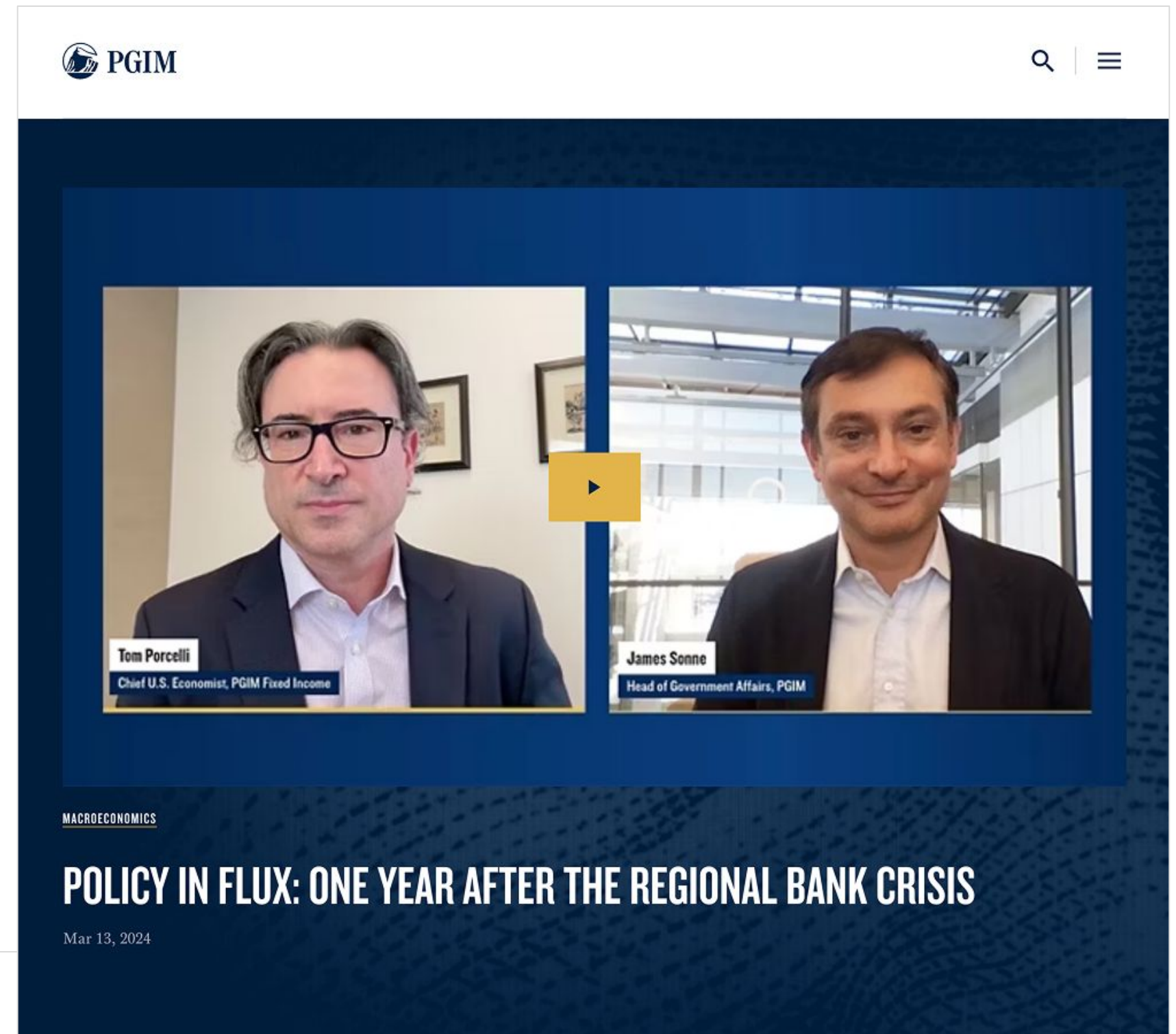


PGIM's market update videos

Delivering timely insights in snackable format

- PGIM uses short expert videos as a core investor strategy.
- Regular 2-minute clips on key market events (e.g. Fed moves, volatility).
- Keeps content actionable, timely, and respectful of client time.
- Well-received by investors—proof that video is a competitive advantage in client experience.

In today's market, *video isn't optional* — it's a race to relevance.



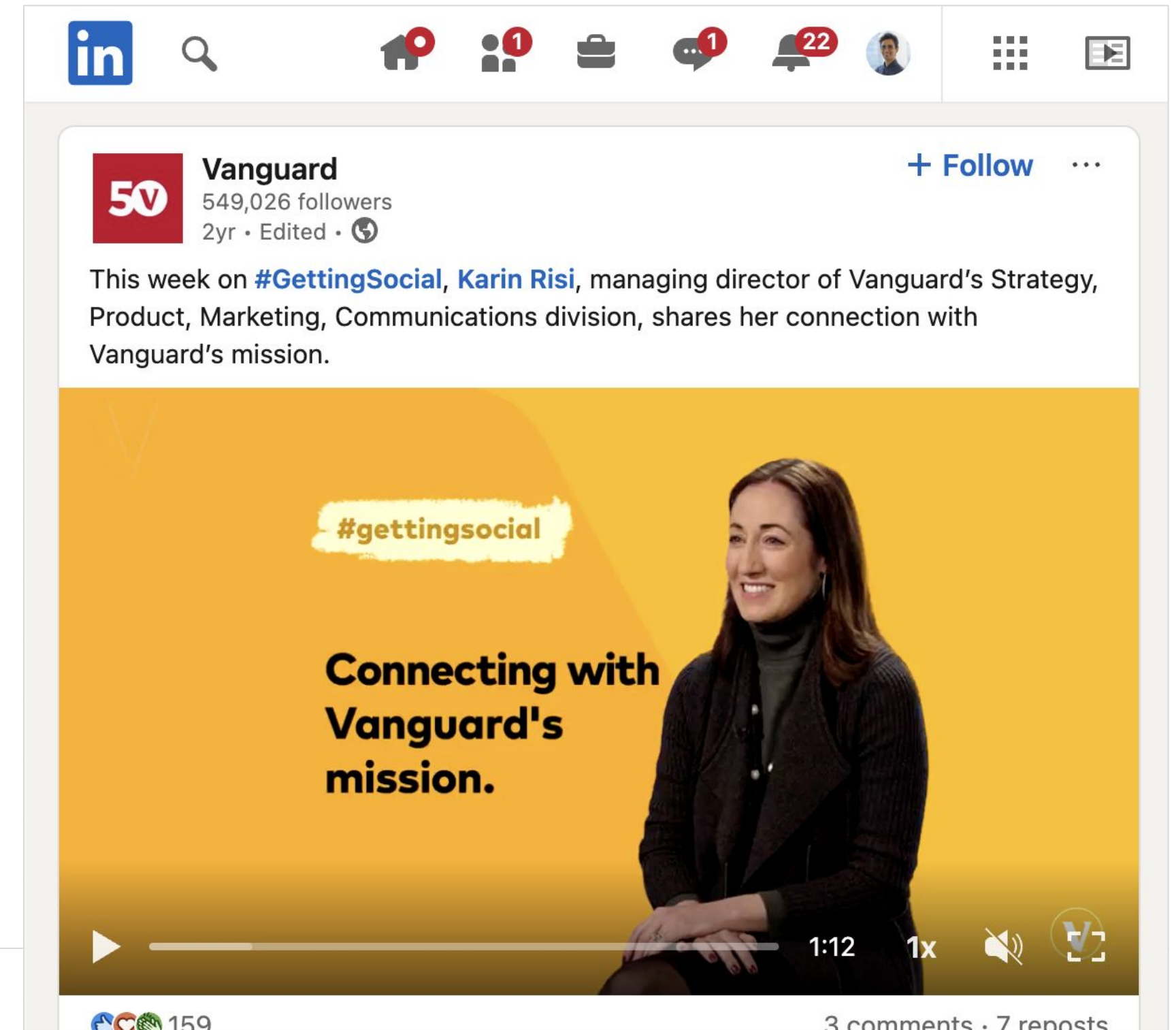
Vanguard's #GettingSocial Series

Building habits with weekly snackable video

- Vanguard runs a weekly social video series on investing and financial topics.
- Consistent cadence trains audiences to tune in, driving repeat engagement.
- Short, digestible insights make it easy for busy viewers to stay informed.
- Proves that snackable + consistent = long-term audience loyalty.

Regular, relevant video builds trust—and a following.

Vanguard[®]



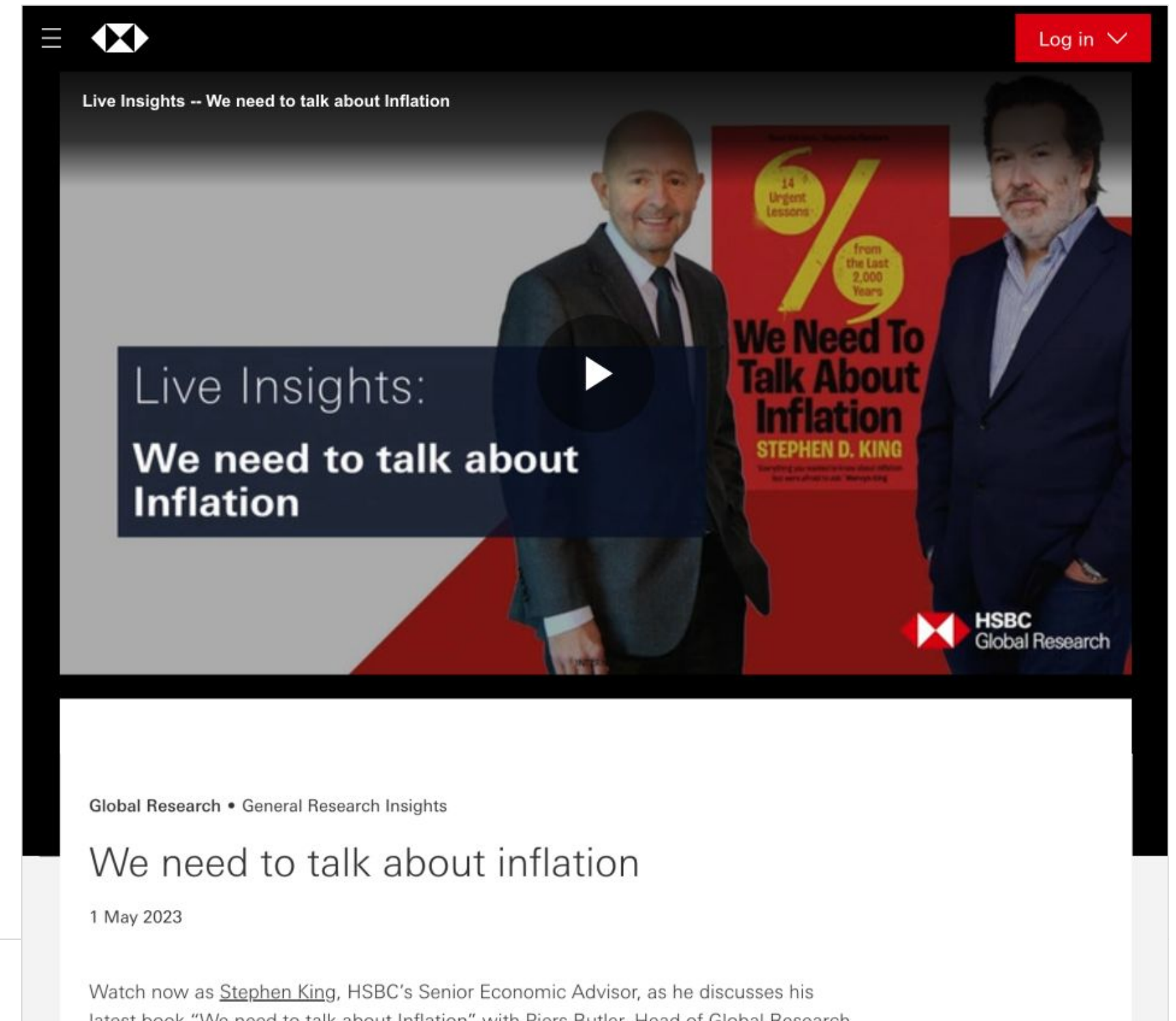
HSBC's executive social



Boosting engagement with thought leadership on LinkedIn

- HSBC rolled out short-form video featuring executives on industry topics.
- Paired with long-form content to maintain a steady stream of C-suite insights.
- Found LinkedIn ideal for distributing snackable content to financial audiences.
- Result: Increased traffic, engagement, and brand visibility.

Snackable video made leadership visible—and the brand more relatable.

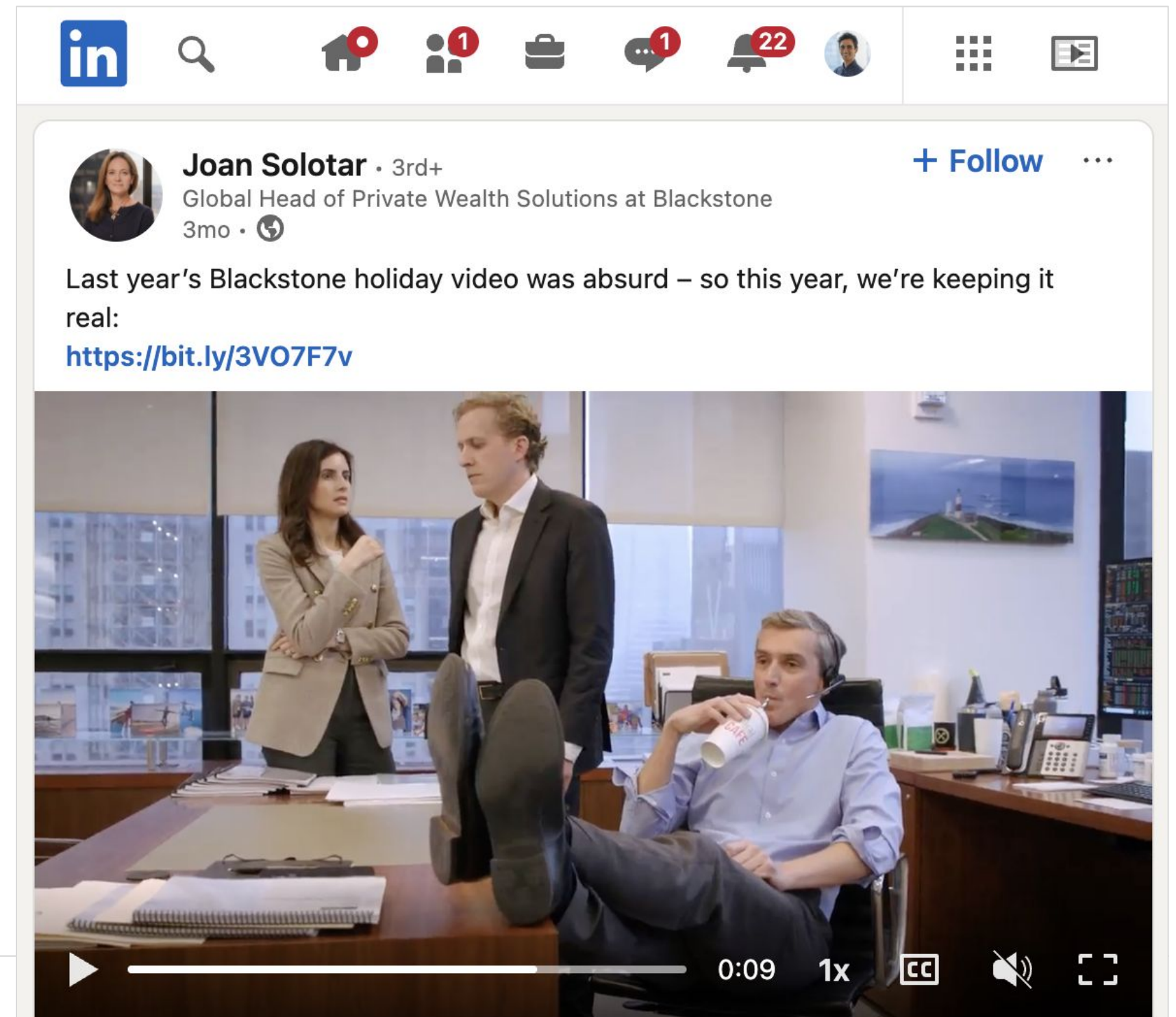


Humanizing the brand, attracting top talent

Blackstone

- Since 2018, Blackstone has produced humorous holiday videos featuring employees and execs.
- Designed to showcase culture and break the buttoned-up brand stereotype.
- Videos have had a direct impact on recruitment and employer brand perception.
- One candidate said: “I want to work here because of the holiday video. You guys know how to make fun of yourselves.”

When culture is real—and on video—it becomes a magnet for talent.



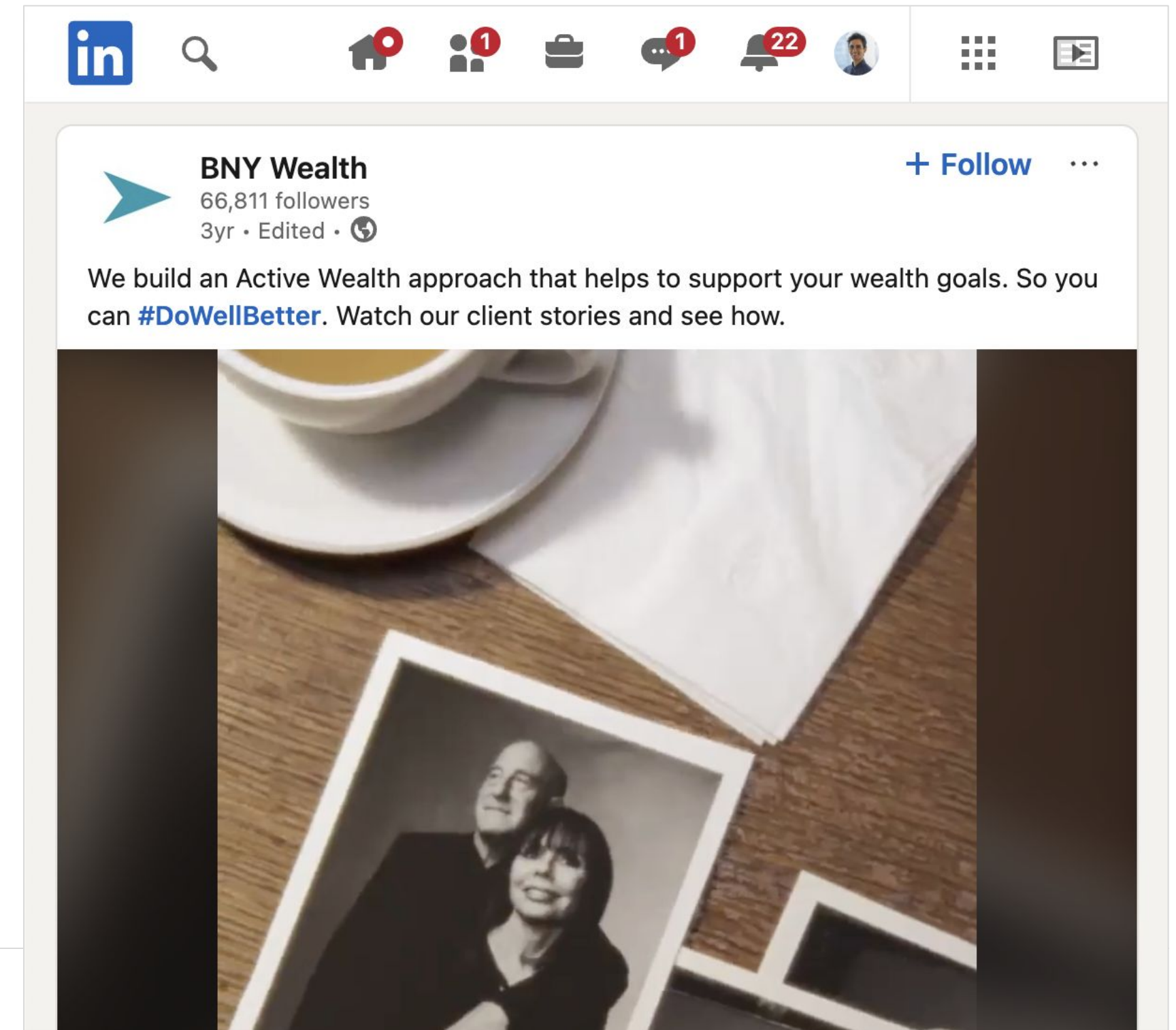
BNY Mellon's #DoWellBetter series



Humanizing BNY Mellon Wealth Through Investor Stories

- BNY Mellon used short video interviews to spotlight how clients use their wealth for good.
- Showcased the impact of sound investing through real, purpose-driven stories.
- Created a human connection with audiences—especially on social platforms.

Client stories make finance feel personal—and social.



Blackstone

"The initial goal of our snackable video series was to create something fun for employees and highlight our culture, *and it's kind of taken on a life of its own*"

— Christine Anderson
Global Head of Corporate Affairs



"Video is an engaging medium for advisors to connect in a modern, simple way. We're modernizing the way advisors communicate with clients and connect with prospects."

— Kirstin Hill
Chief Operating Officer

In summary

01 Wealth Management challenges

Complex & rapidly changing landscape

- Wealth management must keep pace with a rapidly changing market, gain trust and break through to both investors and employees.

Reaching & engaging audiences

- Reaching stakeholders is hard — getting them to engage is even harder.

Shortened attention spans

- You only have 8 seconds to capture

02 Snackable video is a must

Short, authentic video cuts through the noise, fosters trust, and drives action across the *entire* organization.

- REVENUE

RECRUITMENT

L&D
- Captivate investors with expert financial insights
 - Attract top advisors to hire
 - Empower your team with microlearning

Bonus:
SEO algorithms now favor short video, leading to enhanced discoverability, increased engagement, and amplified social reach.

03 How your peers are winning

What snackable content do top firms produce?

- Financial tips series
- Advisor testimonials
- Community initiative highlights
- CEO messages
- Market trends
- Advisor stories



04 Scale is crucial

Multiply your impact using employee advocacy.

- Viewers want content produce by your *people*, not your *company*.
- Reach **561%** more viewers (*EveryoneSocial*)
 - Gets 8x more engagement (*Ambassify*)
 - Viewers are 3x more likely to trust info when shared by staff (*Edelman*)

Without snackable video, you're missing a key market shift in engagement.