

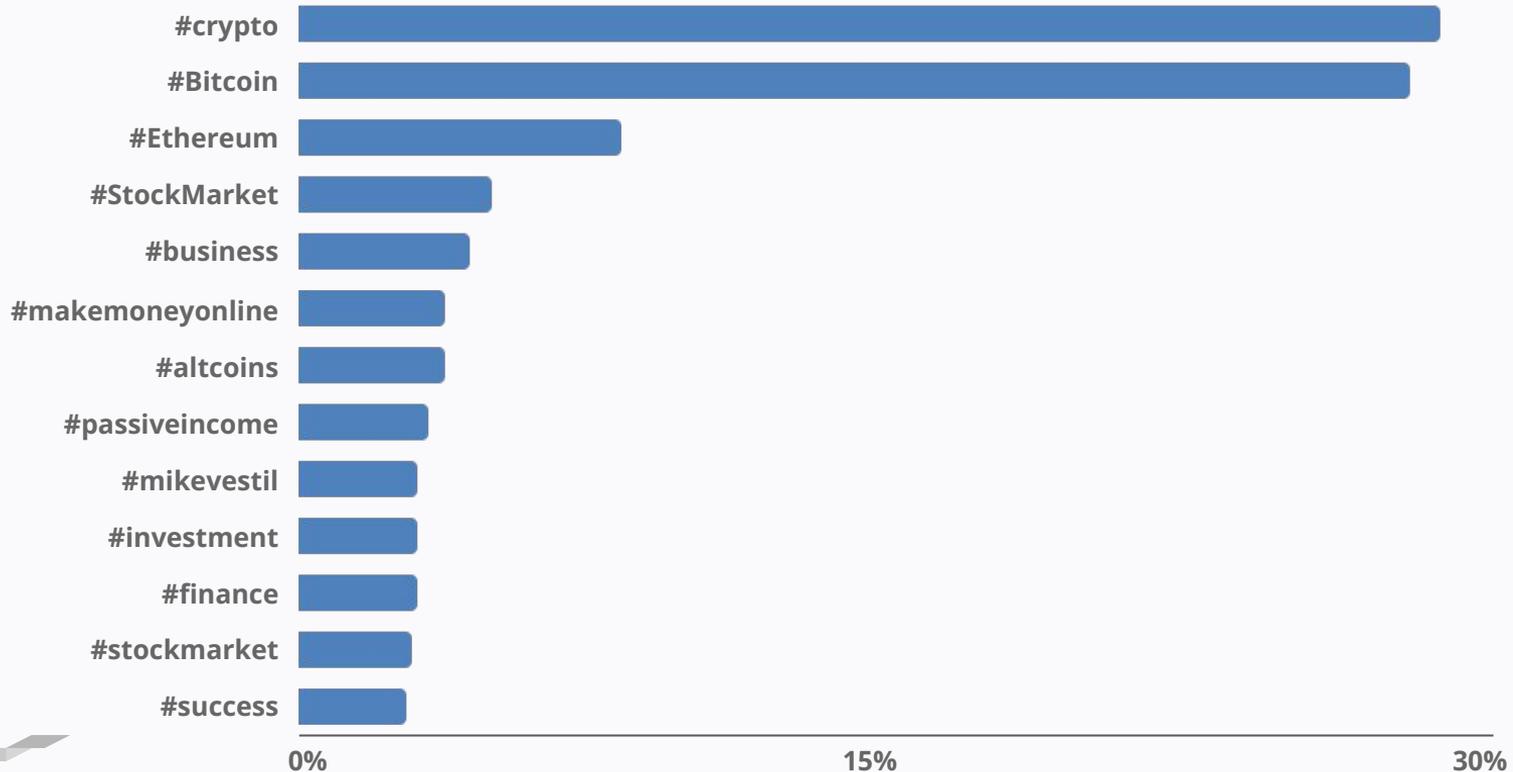


**Trends in Financial Advisor
Conversations on Twitter**

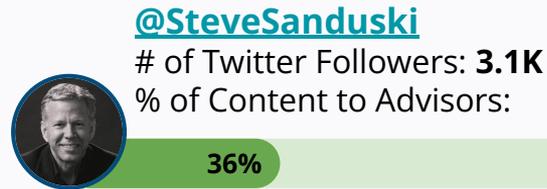
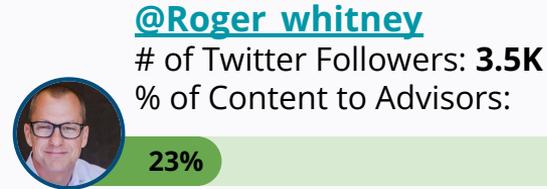
Financial Services

As of October 2021, the online and social landscape was heavily saturated with crypto conversations when assessing content around the keyword “financial advisor advice”.

Trending Hashtags October 22-28, 2021



On average 46% of the following financial influencers' content on Twitter is geared directly towards financial planners and advisors in Q3 2021.



50% of content in Q3 2021 speaks to advisor workflow, interests or news to keep in mind when dealing with clients and training:

Pretty cool visualization via @Riskalyze of the risk of various asset classes. (Number in the upper left of each box is Risk Number rating.) "Periodic Table of Asset Classes" bit.ly/2UzJsVJ | [View](#)

#Adviser Question: are you producing any kind of annual report/summary/deliverable to clients to demonstrate all the 'stuff' you did for them (e.g., the value provided) throughout the year? If so, what do you use to produce, & would you be willing to share it w/ other advisers? | [View](#)

If financial planning is going to be a recognized profession, we need to expose the 'art' of financial planning to academic rigor. | [View](#)

Rise of robo-advisors was predicated on the idea that Millennials would eschew human advisors for #FinTech. In practice, Millennials becoming the MOST desirous for a human financial advisor... "Survey: Millennials Increasingly Turn to Financial Advisors" bit.ly/3zpOvav | [View](#)

Advisor w/ CFA working on CFP makes the case that CFP is harder than CFA. I think it's really a mindset difference. CFA is a mile deep, CFP is a mile wide. Either can be challenging. Depends how your brain leans?"Which is Harder – the CFA or CFP Exam?" bit.ly/3ICUrsJ | [View](#)

The other half of content in Q3 2021 addresses more tactical methods to keep in mind while working as an advisor or planner:

A Hierarchy Of The Value A Financial Advisor Provides - kitc.es/2518Xgl | [View](#)

Limits Of Tax Diversification And The Tax Alpha Of Roth Optimization: bit.ly/38cPpeG #Advicers | [View](#)

I look forward to the day when learning how to help behavior change is a core part of the FP curriculum! | [View](#)

"Everyone would get ""Portable Retirement & Investment Account"" (PRIA) when they get an SSN. Could roll money into it from various IRAs or 401(k)s. Why not just expand IRAs & be done w/ it?? "New Bill Would Create Portable Retirement & Investment Accounts" bit.ly/39rClx8 | [View](#)

Question to #Advicers - when doing a Monte Carlo analysis to project a client's retirement plan, what do you consider an 'acceptable' probability of success where you tell the client it's OK to proceed? | [View](#)

6 Key Value Propositions A Good Financial Planner Can Provide - bit.ly/1mmDQrc | [View](#)

Many Twitter advisor influencers have their own podcasts to engage in longer and more detailed conversations directly impacting advisors.



“Advisor Talk with Frank LaRosa offers unfiltered guidance and advice for financial advisors, wealth management professionals, and entrepreneurs alike who are interested in maximizing both their business and personal potential.”

[Click to View](#)



“A no-holds barred conversation for Real Financial Advisors with industry nerd Michael Kitces and client communication expert Carl Richards.”

[Click to View](#)



“The Financial Advisor Success podcast brings you real success stories and insights from the most successful financial advisors, and leading industry consultants, about how to take your advisory business to the next level.”

[Click to View](#)

There are various financial CFA/CFP influencers who often have **no posts speaking directly to certified financial advisors** but act as a news source for detailed and updated information.



[@leadlagreport](#)

of Twitter Followers: **530.5K**

Michael A. Gayed, CFA @leadlagreport · 5h

[\\$SHIB](#)'s market cap at \$38 billion is greater than every single company listed in the Russell 2000 Index.

Few understand this.

42

125

691



[@Invest420](#)

of Twitter Followers: **35.8K**

Alan Brochstein, CFA @Invest420 · Oct 26

Turning Point Brands Zig-Zag Products Q3 Revenue Increases 17% to \$42 Million [newcannabisventures.com/turning-point-...](#) #cannabis \$TPB



[@CVecchioFX](#)

of Twitter Followers: **51.3K**

Christopher Vecchio, CFA @CVecchioFX · Oct 25

Several central bank meetings and initial 3Q'21 GDP releases from around the globe are due out this week - let's talk about how they could impact markets. Starting now!

DailyFX @DailyFX · Oct 25

Join @CVecchioFX at 7:30 EST/11:30 GMT for a webinar on developing a strategy for major event risk. Register here: bit.ly/3r4h0pP



[@HumbleStudent](#)

of Twitter Followers: **8.5K**

Cam Hui, CFA @HumbleStudent · Sep 27

The updated returns of our Trend Asset Allocation Model

1 year: Model 23.9% vs. 60/40 19.0%

2 years: Model 20.8% vs. 60/40 15.9%

3 years: Model 16.9% vs. 60/40 13.3%

5 years: Model 15.3% vs. 60/40 11.7%

Key Takeaways

The current social and digital landscape for discussion in the financial is still heavily skewed to support conversations around crypto as opposed to traditional financial practices. Regardless, there are CFA and CFP certified content creators on Twitter still engaging in conversations around financial advisor advice and topics.

- **Creator Content Breakdown:** Financial advisor influencers on Twitter who are engaged in conversations about their industry are dedicating about 46% on average of their content to speaking directly to other advisors about their strategies and relevant news. 50% of advisor-based content speaks directly to dealing with clients and setting yourself apart as an advisor. The other 50% of content addresses tactics or strategies to keep in mind for clients.
- **Certified Advisor Network:** There is a network of other certified financial professionals on Twitter. However, their content is not geared specifically towards advisors but touch upon the accessibility of staying up to date with trading news. This is geared to all types of investors and not just advisors.