

Ep#193: Mastering Advisor Video Marketing with Katie Braden



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Ep#193: Mastering Advisor Video Marketing with Katie Braden

Welcome to the *New Planner Podcast*, where it's all about helping you successfully enter the financial planning profession and accelerate your financial planning career.

This podcast will help you understand the profession, become familiar with the various career paths available to you, and avoid the mistakes that limit your success.

Join your host, Caleb Brown, to explore the human side of creating a successful planning career through interviews, personal experience, and insights from the trenches.

Let's get started.

Caleb Brown: Welcome to the 193rd episode of the New Planner Podcast. This is Caleb Brown, your host. My guest today is Katie Braden, who is the founder of [Advisor Video Marketing](#). Katie joins the show today to share how she entered the financial planning industry after graduating with a degree in photography. How she joined a family-owned firm but soon realized she wanted to serve clients differently and provide financial planning services. Plus the book she bought to teach herself how to do financial planning.

Katie goes on to share her experience of launching her own all-virtual firm that offered a modular approach and no product sales, then how she became re-energized in her creative interest as she was doing the marketing for her firm, and how she realized it was time to close her firm and focus on training other financial planners to utilize video effectively. Stay tuned to the end for lots of tips and characteristics of what makes people successful in video marketing, as well as some of the best ways videos can be used for business development.

I hope you enjoyed my interview with Katie Brayden.

Hi Katie, welcome to the New Planner Podcast.

Katie Braden: Hey, Caleb. It is awesome to be here.

Caleb Brown: So awesome to have you. Thanks so much for making time and coming on the show. And we were talking before we came on air. I'm just really excited to learn more about you.

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And I know you do the video marketing stuff now. I mean, you're a CFP. You were an advisor and then had your own firm. So we want to hear all about that. So if you would maybe just start from the beginning and just bring us up to present day.

Katie Braden: All right, beginning, I think I'll go back to 2000, early 2000s—we'll go about 20-25 years.

I am from Seattle originally, and Caleb, I have been a contrarian my entire life. So, in high school, when everyone was like, "I'm going to the University of Washington. I'm going to major in business and finance and economics," I was like, "Huh." I pulled out a globe, and the joke is I didn't love the weather in Seattle, so I was like, "How far away from here can I get?"

So, I actually graduated [RMIT University](#) in Melbourne, Australia with a degree in photography.

Caleb Brown: Nice.

Katie Braden: Yes. So, that's how it started. I wanted to be a world traveler. I wanted to do photojournalism. Then the government kicked me out. So, they chained the immigration rules literally right before I graduated.

Caleb Brown: Oh no.

Katie Braden: Yep. So after you get your degree and everything, you have 90 days to leave. And so my mom owned an RIA in Seattle. And so she was like, "Hey, you need a job. Would you like to come work for me?" And I was like, "I do need a job." And Caleb, this was 2006, January of 2006. Her firm was already completely virtual.

Paperless office, virtual clients, like she had a lifestyle practice. And so it was like, hey, I can be part of the firm. I can have a steady job and still travel the world and do all the things I love. That's pretty cool. So I was ultimately her succession plan. I was there for seven years. And during that time, I was going into our 401k plans.

We managed talking with employees. And Caleb, over and over again, I was getting questions that I couldn't answer because we were an investment-management only firm, AUM only. And so I kid you not, I was visiting my dad and I was at a Barnes and Noble and I found the Idiot's Guide to Financial Planning.

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And that is the first time I ever heard about CFP certification.

Caleb Brown: Wow.

Katie Braden: So I went down that path, became a CFP professional, and then it kind of dawned on me. I was like, I don't really honestly understand how we're doing investments only without understanding the rest of the picture. And so it got to this kind of friction point where I was being handed a very successful business.

But I was like, I don't really believe in it. And so I had a light bulb moment. I know exactly where I was on the freeway. And I was like, "I need to create the financial planning business that I would want to work with." Because I had at that time spent two years interviewing other firms, talking with other firms.

And I think that's where a lot of my creative side actually comes in handy. And so for people listening to this that are in different positions and looking around, and they're like, "I feel like something should be done differently." Or "I feel like there's a different way to do this." Listen to your gut. To me, that has been kind of my saving grace throughout my life—that and just, again, being a contrarian.

And so in early 2013, I started one of the first completely virtual monthly subscription financial planning businesses. I did no AUM, I have never sold a product, and I did modular financial planning. So I was like, I want to build real relationships. I want to just tackle one topic at a time, the most important things, continue to revisit.

And then I really wanted to get back to that creative side. So in 2013, I was doing video in my financial planning business. And so I had video newsletters, I had a YouTube channel, I had video on my website. And I realized people, when they got to that discovery call with me, they already knew me. I had never heard of them, but they knew me.

They were ready to work with me. I was like, this is interesting. So I started speaking out in the profession. I tend to have an opinion or 42. And so I was speaking at a lot of conferences. Then I actually ended up speaking, working, and consulting with financial planners in 35 countries. So I was working all over the world.

I ended up working for the global organization that oversees CFP certification everywhere outside the U.S. So in that time, I wound up my practice, and then I was back to my world traveling. Like, that's my thing. I love traveling. I've always wanted to

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travel. I had so much fun doing that. Just incredible experiences. Worked with amazing people.

But it wasn't actually feeding the parts of me that it needed to. It was interesting work, but it wasn't the right work for me. And so I left brilliantly time—

Caleb Brown: This was Financial Planning Standards Board?

Katie Braden: Yes. FPSB, located in Denver. So we're living downtown Denver, love Denver.

And then I was like, I just need to do something else. And COVID hit, for me, at just the best time ever because I didn't know what I wanted to do. I needed that break. And so the world shut down and I was like, "Great, I can take time. I can think about it." I was kind of like the Chief Operating Officer of my mom's firm.

I had run a firm. I've done so many different things. And I think that's something that all humans struggle with, right? Especially, I remember going through college, there's all this pressure to figure out what you want to do and what's your career. And I always encourage people, "You don't ever have to have the answers."

Even if you're five or ten or twenty years into something, sometimes it's good to kind of pause and revisit. And so I sat down and I was like, "Alright, I love the creative side, and I know the profession." And so I was like, "How can I kind of combine these?" And that's when I ultimately came up with working with really great financial advisors and financial planners on video marketing and how to leverage video throughout their business.

Caleb Brown: That's so cool. Thanks for walking us through that. That's so cool. I mean, early adopter, certainly on the video stuff. I mean, I think I still go to website on the recruiting business we have and people don't have, like, "Oh, we don't do that." Or "We don't know how to do that." Or "We don't want to do that."

Okay. So you shut the firm—you shut your RIA firm down, then went to FPSB, and then you pivoted during the COVID. I think, I guess that's when you figured out, "I'm going to set up this new business serving advisor or helping advisors with the videos."

Katie Braden: Absolutely. Yeah. And COVID was a big part of it because I think you remember early COVID, right?

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Everyone was like, “How do you work virtually? How do you do any of this?” And remember, I joined the profession in 2006. That's the only thing I've ever known. So I was like, “What do you mean you don't know how to do this?” And I realized I was like, it's these really small things that are such a huge benefit.

I was like, I can work at a very high technical level, but it just that didn't bring me joy. I was like, I love making things as easy as possible for advisors and then seeing really great results from it.

Caleb Brown: Okay. So you've been doing that—I don't know—it was like January, 2020, I guess. Is that when you started?

Katie Braden: What, four and a half years?

Caleb Brown: Four and a half years. So just talk to us. What's the business? I mean, what are you doing? What's the service? What's the business model?

Katie Braden: Sure. So right now, so my company is called Advisor Video Marketing. I didn't try to get creative with that. Let's keep it simple. And so my main thing is I run 12-week virtual workshops with advisors.

They're kept small, sort of like 6, 8, 10 people max. And that runs for 12 weeks, and we walk through every single step of what advisors need to do, from “I've never done a video” to launching a YouTube channel with professionally edited videos. And so that's a whole lot of fun. Advisors have become friends during these workshops, you get to know each other.

So you get the camaraderie, you get the accountability because we're meeting every week. I'm there to support them throughout. So some advisors come in and they're like, “Hey, I actually want to kind of transition into a lifestyle practice. I don't want to grow my business, but I want to use video to proactively communicate with clients or to streamline operations, improve the client experience.”

Others are in that growth stage, so meeting advisors wherever they're at and whatever makes the most sense for them. And then, by demand, a lot of people are like, “Yeah, but I still need the coaching, I still need the editing, I still need help.” So only for people who have gone through the workshop, we've also launched an ongoing group coaching and editing program.

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So advisors are like, “Hey, I’m committed to doing two videos a month or four videos a month.” So we edit those, we work with them, we strategize, plan, and then kind of track the success and results with those.

Caleb Brown: I’m glad you mentioned the video—it’s more than just getting clients. I mean, it’s actually a lot more. There’s a lot more, many uses of that.

Katie Braden: Yeah. There’s so many uses. I mean, my favorite use is honestly just one-to-one video messages. And that’s where, if you’re on LinkedIn, right, you always see people’s birthday. It’s such an amazing opportunity.

If there’s a prospect you’ve been talking to, or a center of influence to just send a 30-second happy birthday video, Caleb, every single time I’ve done that, I get a response, and the amount of times people are like, “I’ve gotten over a hundred messages today.” Right. Everybody clicks that like automated ‘happy birthday’ LinkedIn. And they’re like, “Yours is the only one I responded to because it stands out.” Advisors are always looking for a way to differentiate.

I’ve been saying this for the last 10 years, I have a feeling I’ll say for the next 10 years, video is one of the best ways to do that.

Caleb Brown: I mean, it’s not a lot of time, but it’s some time just to do that. And then look at the payoff, look at the reward. Especially if you were able to land the client that you’ve been going after.

Okay. So, but, okay. The format, they’re not just—you’re not lecturing them. I mean, you’re getting on this 12-week program and are they having to do homework and you’re sort of like grading them and scoring them and giving them coaching and suggestions?

Katie Braden: Absolutely. So every single week we have a specific focus and we build on it every week and they have a homework assignment every week of a one to two-minute video.

So in the beginning, we’re really just practicing things as simple as like getting your eye contact, practicing smiling at the beginning and end of videos. Because one of the things we’ve seen, and you’ve probably seen this too, Caleb, is people will go in and they’ll go straight to like a highly professional edited studio scripted video.

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And then afterwards they'll be like, "Well, I don't like that at all." Because they weren't comfortable. It's not something they've done. They didn't get used to hearing their voice. And so, getting that foundation is huge. Getting comfortable and confident on camera, that is honestly, that is the biggest part of it.

Caleb Brown: What are some of the biggest mistakes? I know you've seen a lot. What are the most common, I guess, mistakes? And then we'll go into the biggest mistakes.

Katie Braden: Yeah, I mean, audio, lighting, framing, and background are really the big things. And all I do is talk with advisors all day, every day. And the amount of times I'm just shocked.

I'm like, "This is not creating a good experience for your clients, for your prospects, right?" When their audio is atrocious, it sounds like they've been dropped down a tin can. When their lighting is so bad, you can't even see them. Backgrounds, Caleb, I am neutral on so many things, but fake Zoom and blurred backgrounds, I am not neutral on that at all.

Please, please stop using those. They're not good. They do not build trust. If you need your brand in the background, like, go get a t-shirt.

Caleb Brown: I actually saw your video you just posted, and they have a blog post along as well. And it was awesome. It was hilarious because I was like, look, I mean, yours truly.

I'm like, "Oh boy, I'm one of those people she's talking to." I need to stop this. And in all seriousness, lots of good tips and content on the website that you have. And I take a look at those and try to incorporate some of that stuff. And also just thank you for putting that out there.

One, talk to us about what else do you see? What works well? Or maybe someone's sitting there saying, "Look, I'm a newer planner. I want to do video, but I'm not comfortable. One, I'm putting myself out there, but two, I don't know how to do this." What would you tell them?

Katie Braden: Yeah. And that's exactly it. I have a lot of people that join the workshop that they're honestly like, "I don't have any idea what I want to do with video." They're like, "I just know the video is important." And so that's honestly the thing that I really

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never expected that has been the most amazing is seeing how it helps increase confidence.

So I love working with newer planners, career changers, because it's such a great opportunity to build that confidence to help them find their voice. You're gonna be you in front of clients. So that is the exact same person that should be showing up on video. If you're a guy and you don't ever wear a suit and tie to a meeting, don't do videos in a suit and tie because you think that's some persona that you need to put out there.

So it's just a really good opportunity to kind of say, what is your style? Who do you want to attract, right? And that gets into so many things that we humans do in meetings, in prospect situations, in networking events, right? We are almost somehow trying to put on these different masks of things.

And I'm like, let's get rid of the masks. Let's find out who are you? If you're really calm and introverted, great, we can do really calm videos and you're going to attract other people that really appreciate that. If you have a ton of energy, great, let's show that. So that's kind of a big thing.

And it's like starting anything new at all. It's just getting started and practicing.

Caleb Brown: Yeah. I mean, I feel like too, if you don't enjoy it and it's not—I mean, you're going to just, you're not going to keep it up. You're not going to keep doing it. And I think sort of what I've learned on there, like you need to keep putting out regular content, right?

I mean, is that you and sort of all the other marketing people would probably agree?

Katie Braden: You have to put it out there because the other funny thing that I see so often is advisors will put their heart and soul and all this time into a video and then they're like, "I'm gonna put it out there, it's gonna go viral, it's gonna be amazing," and crickets.

And then they'll do other videos that they put no effort into, they just grab the camera because they had thoughts one day, they put it out there, best response they get. And so I tell everyone—with love—what you think about your videos doesn't matter at all. You have to put them out into the world and let the universe bring back to you what you need to hear.

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Caleb Brown: Yeah, that's great. Great advice. And you touched on this a little bit in that last segment, but just the people that you see that are—what are the common characteristics of people that are successful with the video? What, what do they have or what are they doing differently?

Katie Braden: They're not trying to do 42 things at once. That would be the big thing. When I hop on calls with people that are like, “Hey, I'm thinking about your workshop.” They're like, “And I'm going to launch a blog and a podcast and my YouTube channel. And I'm rebranding and I'm having twins.” No, we're not doing this.

This is not going to lead to success. So people that really have that mindset of “I am going to focus on one thing. I'm going to give it my all. I know I'm not going to get results in the first two weeks.” That's where it's really important. And I know you see this too, Caleb, right?

Advisors have the biggest shiny object syndrome ever paired with analysis paralysis. So they're like jumping around trying to do too many things, but not actually getting anything done because they get stuck in just analyzing things.

Caleb Brown: Well, I mean, that's kind of a good segment of the next. I'm like some of the equipment and I know you have some of this on your website, but I'll I know some colleagues who will spend like weeks and months like, “Oh, I got to find the right microphone.”

No, just hold your phone up in front of your face and just start talking and that's what you need to do.

Katie Braden: That's exactly it. I tell them and I reinforce that every single week in the workshops with everybody I talk to. I encourage people to reach out to me on LinkedIn and my website. Use what you've got.

Like, keep it simple. Because here's the thing, if it's not easy, you're not going to do it. And I talk with advisors every single week that have \$5k, \$7k, \$10k of equipment still in a box in the closet. I'm like, “Guess what? Videos don't create themselves. That isn't what you need.”

Which again is why I focus so much on building that comfort, building that confidence. And again, getting those videos out there, doing those one-to-one videos where you don't need anything else except your phone and natural light. Do it while you're out on a

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morning walk, send a client a video. That's going to have so much more impact than spending \$5k on equipment, writing a script, sitting down, feeling awkward, So I'm just so big on it's got to be easy and it's got to be authentic, meaning, you know, not robotic.

Caleb Brown: Well, I mean, you said it's genuine from the heart. That's what people want, right? But I was going to ask you about, should people write a script? What do you recommend?

Katie Braden: So I was against scripts for a long time, but then working with more and more advisors, I'm a big fan of whatever gets them to the next thing.

So I feel like my biggest job is looking at every barrier that people encounter and finding a way to knock it down. So if you're going to do scripts and that's going to get videos done, cool. The only thing I will say that's an absolute requirement—as you're doing the script, you have to read it to yourself out loud. Not in your head.

It has to be done out loud because that's where you'll pick up and make the changes that make you sound human because no person actually writes the same way they talk. So constantly advisors are writing scripts and then they'll go record it and they're like, “That was really weird.”

And that's exactly why. So that's the only requirement there. Read it out loud.

Caleb Brown: I learned that lesson when I was writing my second book. I'm like, “You got to read it out loud.” Cause we did an audiobook, and all right. All good points. Well, maybe just talk to us a little bit more about where do you see the future of video usage and any sort of idea? What are we need to be thinking about next?

Katie Braden: So one of my biggest passions around this, actually probably what really got me going hard down this path, is I still talk to family and friends and colleagues that have no idea who financial planners are and what they do. And not only has that been the case probably forever, but now with the rise of *finfluencers*, it's even more confusing and harder.

So that's why I'm passionate about really good advisors getting their message out there and letting people know, “Hey, I'm here. This is what I look like. This is what I do. This is how I can help you.” Because people think that it's only really big companies that maybe don't have their best interests at heart or *finfluencers*.

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And there is just such a massive opportunity out there.

Caleb Brown: Yeah. it's easy to get lost in the crowd with all the information being put out there. Right? I mean, I had to take YouTube off my phone. I'm like, man, I'm wasting so much time on this. Now my kids want to get on there, but okay. Got it.

So new planners. How can they, let's say they're at a firm. Firm's not using video. They want to use video. What do you suggest they tell, ask their boss or tell their boss or do it on their own? What do you suggest?

Katie Braden: So if they have a good relationship and it's a place that they want to stay, then it's the same advice I give for people who kind of use compliance as an excuse.

If we peel back the layers, right, the amount of vibes, you're like, I can't do it for compliance. People need to kind of see some of that consistency. So when you're trying anything new, right, I like the ask forgiveness approach. Not necessarily with compliance. I'll get to that. But if you just kind of go out and approach your boss or something, you're like, "Hey, I want to do video."

It's kind of easy for them to say, "No, we don't really want to do that." But if you're really passionate about it, you see the value, you see how it can benefit your client experience, your sales process, marketing, communications, then actually starting to create some videos and then showing them that, right?

Because most people are visual, and when they actually see it and they see what a difference it can make, then it softens people, and it makes it easier to adopt, which is what I say with compliance of sometimes people are like, "Hey, I'm going to do a script and I'm going to try to get compliance approval."

And I usually say, "Look, I always say start with two-minute videos." The majority of videos watched online are two minutes or less anyway, so let's start nice and simple. And again, give a recorded video with a transcript to compliance and keep doing it. And then they'll get used to your voice, what you're trying to do, what you're trying to accomplish.

And as they see it, it just makes it easier and easier for everyone involved. Whereas if you start in the beginning, right, you can just create that friction. Humans are so good at creating friction. So it's like, how can you release that friction? You want to practice. You want to try things. Give more of it.

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It doesn't need to be a perfectly edited finished product, but actually record some videos and show that.

Caleb Brown: So I want to go back to the two-minute thing. I mean, I've always heard like, it's either got to be really, really short or really, really long. There's not really, it's kind of no man's land in the middle.

Is that sort of what you see?

Katie Braden: Yes and no. So what I usually see is when I'm working with advisors that are in growth mode, then I usually say, "Look, kind of more of the seven to 12-minute video can be a pretty good sweet spot, right?" Advisors have a lot of complex topics. You absolutely have to have a very clear niche of who you're trying to attract.

And then you want to take clips from that. And put those clips on social media. And so that's where if you think about that marketing funnel, those clips are going to be the top of the funnel. They're going to keep seeing you. You want that repetition, right? If you do one video that's 10 minutes long, that's a big investment for people.

So you want them to keep seeing clips from this. Keep seeing your face. You're going to stay top of mind and they're like, "Oh, hey, I want to go watch this full video. I want to see all that." Then they really are building the relationship with you. If you have a good call to action, then they go to your website.

Once they're there, they are a super warm lead. They're like, "Yep, I know you. I like you. I trust you. Let's talk."

Caleb Brown: Talk to us a little bit about the experience you've had or you've seen like firms that have had success using videos to train their new employee. Whether it's like a Loom screen recording or what are you seeing firms do there and that side?

Katie Braden: Yeah, so on the training, so Loom is hands down what I recommend for that. So for anybody that's not familiar, Loom, L-O-O-M.com. So that's kind of what it was built for, is it's so great to do screen recording. Caleb, I actually have sent four Looms already this morning before our call, as people are reaching out to me for different things, and I'm like, "Hey, I want to just show you how to do this."

Again, most people are visual, so actually being able to see on the screen, what are you looking at, versus emails going back and forth. I read an article last year that said just in

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the U.S. alone, something like \$4 billion is wasted every year just on poor communication. Like, think how fascinating that is.

And when you think about the onboarding experience—new planners coming in—this is where it's so powerful to have experienced advisors as you're doing your everyday tasks. No extra effort. You don't have to go create a whole training manual. As you're doing things, just hit that record button.

Show people, “Hey, this is how we open an account. This is how we do transfers. This is how we place trades. This is how we do research.” Like, so easy. And again, that's where it's like, sometimes it's the easiest things that really do have the biggest impact.

Caleb Brown: And I would tell the new planners, if someone's teaching you the old school way, maybe you go back and practice and hit the record button on Loom, and then you build out the library for the next person.

So then you can go to your boss and say, “Look, video is like really beneficial, right? Maybe we should start using this for something else.”

Katie Braden: Exactly. I love that.

Caleb Brown: Yeah, all good stuff. Well, what else? Any other thoughts, ideas? What else are you working on? I'm just curious. You have a really cool background.

You've got sort of your hand in a lot of different things and anything else you're seeing on the horizon or that you're working on?

Katie Braden: On the horizon. Was that a flying pun?

Caleb Brown: You didn't mention the pilot's license. Yeah.

Katie Braden: Right, I'm also a private pilot, just to round out. Photography degree, CFP professional, video marketing expert, private pilot.

Caleb Brown: I mean, anything else out there that you're working on, or any projects, or any new courses, or material, or anything?

Katie Braden: So I'm really sticking, and this is what I love with coaching advisors, because once you're talking about video, you end up talking about the entire business plan.

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You talk about who is your target client, your whole marketing funnel, your client experience. And so that's where I get to have a lot of fun with those conversations. And so I'm just so big on the *less is more* and really trying to practice what I preach. So I was like, I'm just going to stick with, my goal is to just do six of these workshops a year and have like 20 people in the ongoing program.

Caleb Brown: Gotcha. Okay. And then I was just listening to you talk. I just had a thought, how do you coach people? I mean, I'm guilty of this myself, but I know I see it a lot in job seekers, especially when they're in these video interviews, like keeping the engagement and the excitement and then the enthusiasm levels high.

What do you tell people on that?

Katie Braden: In video interviews?

Caleb Brown: Yes.

Katie Braden: So one of the big things is stand up. So right now I'm standing up. And so if we think about kind of physiological responses in our body, when we're sitting down, we tend to be slouched over, our shoulders aren't good, our posture isn't good.

When you stand up, it opens your chest, you have better posture. It just brings more energy. And your body is in more of a like, "Let's go." We've heard about the power pose, right? Standing up, assuming that power pose, it brings more energy with that, and that will come through.

Your hand gestures are a lot more natural when you're standing, right? Because you're not leaning over on a desk. Again, your posture is good. Your eye contact. Make sure that your camera is right at eye level or slightly above. Don't be looking down. Nobody needs to be counting your nose hairs.

Don't be looking up. It's just try to make it feel, the goal, with video, any video, if it's a virtual meeting, video for YouTube, you're really trying to emulate what it feels like being in person. So with that, the other thing I'll say that you may have also seen on LinkedIn that drives me crazy.

When you think about framing, you should always have more room below your chin than above your head. So again, think about like, how is it going to be in meetings? We don't need to see your ceiling. Like even if you're hanging out at the Sistine Chapel, we

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want to see you. Right? So I'm constantly seeing people where it's like they're ducked in the bottom corner of the video, right?

And you can't see their hand gestures. It's not giving a good impression. Again, virtual meeting or video. So make sure we want to see your hand gestures, more room below your chin and that good lighting.

Caleb Brown: You mentioned the Sistine Chapel and I also saw on your website over 50 countries visited. So what's your favorite place to go?

Katie Braden: They're all so different. I mean, living in Melbourne, Australia, that was my favorite for a long, long time. South Africa, I've been there many times. I absolutely love it. Amsterdam is probably my favorite city to walk because you literally can't get lost. You can walk 14 miles and it just keeps going in circles.

Yeah, there's so many places. They're all, they're all different. That's what I love about it.

Caleb Brown: That's amazing. Well, this has been a lot of fun, Katie. Thanks again for coming on here. Any final tips that you'd like to leave the New Planner audience with?

Katie Braden: I would say don't be afraid of AI. That's another thing that's coming up in marketing.

I'm constantly, again, working with advisors. How can we make things as easy as possible? ChatGPT, if you know how to use it, really is amazing. So it's all about, I would say the biggest thing I can say—talk to it exactly, EXACTLY, like you would talk to a human. Give it feedback. Iterate. This can help with those video scripts, with your video ideas, being a second set of eyes on things, asking it to review things.

So that's one of my favorite parts and I'm weaving more and more AI into the workshop and the ongoing stuff because it really is cool.

Caleb Brown: Thanks so much for coming on the show, Katie.

Katie Braden: Thanks, Caleb.

Ep#193: Mastering Advisor Video Marketing with Katie Braden

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