

Expand your network in less time with podcasts

It's nearly impossible to speak directly to all your clients on a regular basis. With a podcast, you can easily get in the ears of your clients and prospects, establishing yourself as a consistent and valuable voice.

Growth is always a goal, but with it comes the pains of having to stay in touch with more clients in the same, meaningful way. For Matthew Costanzo of Costanzo Financial Group, growth came fast—they doubled their AUM in 10 years. Recognizing their financial professional's role as an educator first, he knew his firm needed to create more client engagement in an efficient way. Understanding that consistency is crucial, he wanted to find a platform that reached many without requiring extensive resources from him and his team. Once he learned about the ease of podcasting from another Cetera Advisors LLC advisor, Matthew found his path forward.

THE SOLUTION

Costanzo Financial Group launched their podcast in 2019, giving clients access to different voices within their firm, introducing themselves to prospects, and offering insights into key economic topics of interest. When the pandemic hit, they used the podcast as an engagement frontrunner during a very turbulent period in the markets. Using MarketingCentral's email tool to promote the podcast to current clients and gaining listeners through referrals, Matthew has seen a 3X increase in net new AUM within two years.

To date, they've released over 50 episodes in less than three years. They've created a schedule of shorter 10–15-minute macro-economic discussions mixed with longer in-depth interviews with subject matter experts, giving listeners a variety of topics and speakers. It's a lean operation of two people plus an external editor (Barevalue) and hosting provider (Libsyn), and they rely on the research from Cetera Investment Management to create content outlines. Using just their iPhone to record, they're able to connect to hundreds of people with only one recording.

Average listens
per episode

150

Cost
per episode

\$37

Listen rate from
email promotion

60%

Figures as of 6/22/22

Create connection in one episode.

Contact the Business Development team at 800.336.8842 to learn how you can grow with Cetera.

“When you have one of the largest research wings in Cetera Investment Management, it's easy to share meaningful content. Start small, stick to basics, and be flexible to your client's emerging needs.”



Matthew Costanzo*

Investment Advisor Representative
Costanzo Financial Group
Cetera Advisors LLC

Individuals affiliated with Cetera firms are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.

“Cetera Financial Group (Cetera)” refers to the network of independent retail firms encompassing, among others, Cetera Advisors LLC, Cetera Advisor Networks LLC, Cetera Investment Services LLC (marketed as Cetera Financial Institutions or Cetera Investors), Cetera Financial Specialists LLC, and First Allied Securities, Inc. All firms are members FINRA / SIPC. Cetera Financial Group is located at 655 W. Broadway, 11th Floor, San Diego, CA 92101.

*Securities and advisory services offered through Cetera Advisors LLC (doing insurance business in CA as CFGA Insurance Agency LLC), member FINRA/SIPC, a broker/dealer and a Registered Investment Adviser. Costanzo Financial Group is a firm owned by region of Cetera Advisors. CA Insurance License Number: 0G83533.