

Value Added Partners

Helping clients since 1981

April 2026

A Short History of Marketing for Financial Advisors

You are reading a historical artifact. The first of these client newsletters was sent in the late 1980s. In order to produce it, a floppy disk containing the text was walked over to a local offset printing shop. (The same place could make color copies, which was cutting edge technology!) After the newsletters were printed, they would be stuffed into envelopes and snail mailed to our clients.

At that time, individual Financial Advisors did little or no marketing. Firms might run ads with bulls running through fields or asserting that when they spoke, 'people listen,' but there was almost no way for individuals to stand out from the crowd. If a prospective client asked us to send them a description of our services, we had nothing. We started this newsletter both to offer our take on the world of finance and to allow us to distribute something if we received a request. That 'innovation' filled the need for several years before we also added a printed brochure.

It was only after financial services firms got past Y2K that they allowed Advisors to host websites. It was a game changer. For the first time, prospective clients could Google us and get a sense of who we are before we sat down with them. The website was enhanced roughly ten years ago when we added a video to the home page.

Today, while we continue to enjoy sharing our thoughts via this newsletter, and we keep our website current, we also communicate via Zoom webinars and short educational videos. The primary medium for the dissemination of that content is no longer via email or on our home page, it is via social media, specifically LinkedIn. Up until now, each member of the team has curated his or her feed, showing the various videos and posting articles of interest. What we did not have is a place where everyone's content is aggregated, a one-stop shop. We are pleased to remedy that lack by announcing the Value Added Partners Newsletter site: [The Value Added Brief](#).

The Value Added Brief

A One-Stop Shop for all things Value Added Partners

This LinkedIn location lists our most recent content and any upcoming events. It will not replace any of the other ways in which we communicate, including this newsletter, but it will enable you and anyone to whom you want to introduce us to get a quick understanding of how we see the financial world. We hope that you will click on that link and subscribe. More important, we know that the world of client communication will continue to evolve. Please feel free to let us know how we can make our outreach more useful to you.

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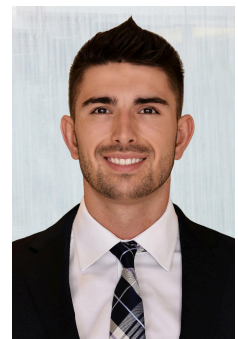
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We look forward to hearing from you.

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