



NOWSPEED

**Digital Advertising  
Competitive Insight  
for Wealth Managers**

# Introduction

The top wealth management companies have learned how to win in digital advertising. Nowspeed has uncovered the secrets to their success as presented in this detailed report.

Nowspeed conducted extensive research on the AdWords campaigns of the top wealth management companies in all 50 states in the USA and identified:

- The best keywords used to get traffic and leads
- The maximum you should spend on keywords in your state
- The actual cost/click of Google Ad campaigns
- The most effective ad copy and key messages

This report is a must-read for any wealth management company who is using, or plans to use, Google AdWords to drive new business, and the [associated interactive website](#) provides detailed data for your state.

Read the full report to get started on the path to digital advertising success.

## Summary: Digital Advertising Analysis of Top Wealth Management Companies

- Top wealth management companies are heavily promoting their brands on Google AdWords.
- Sitelinks are used to promote multiple landing pages in a single ad.
- Callout extensions build credibility: “Financial Advisors on Barrons Top List”.
- Keywords “wealth management” & “wealth planning” are used consistently in ad copy.

## Top Keywords in the Wealth Management Industry

An effective Google AdWords campaign starts with detailed keyword research. When structuring your campaigns, it is vital to focus on keywords that are highly relevant and searched often. Below you will find the industry keywords that have the highest monthly search volume. By targeting these keywords that are searched the most, you have an opportunity to serve your ads to many users who are actively searching about your industry on Google.

The wealth management keywords with the highest search volume are “risk management”, “family trust”, and “irrevocable trust”, which are searched between 14,800 and 27,100 times monthly. These specific keywords and variations of these keywords should be included in your AdWords campaign to generate the most traffic & visibility for your ads. Other top keywords include “risk mitigation” and “risk strategy”. Since users are searching on these terms, it makes sense to structure your ads and landing pages to target their search queries.

It is important to not only bid on these top keywords, but to include them in your Google AdWords ad copy, as well. When you include the keywords that you are bidding on in your ad copy, you are more likely to attain a favorable Quality Score. Google’s Quality Score is a ranking system that determines the best ads to show with each search. Ads with a strong Quality Score will be shown more often, in higher positions, and at a lower cost. Including the keywords you bid on in your landing pages, as well as in your ad copy, will also help to increase your Quality Score. By focusing on the top keywords in your industry, and including them in your bidding, ad copy, and landing page strategies, you will have a strong foundation for a successful AdWords campaign.

# Top Wealth Management Keywords Ranked by Monthly Search Volume

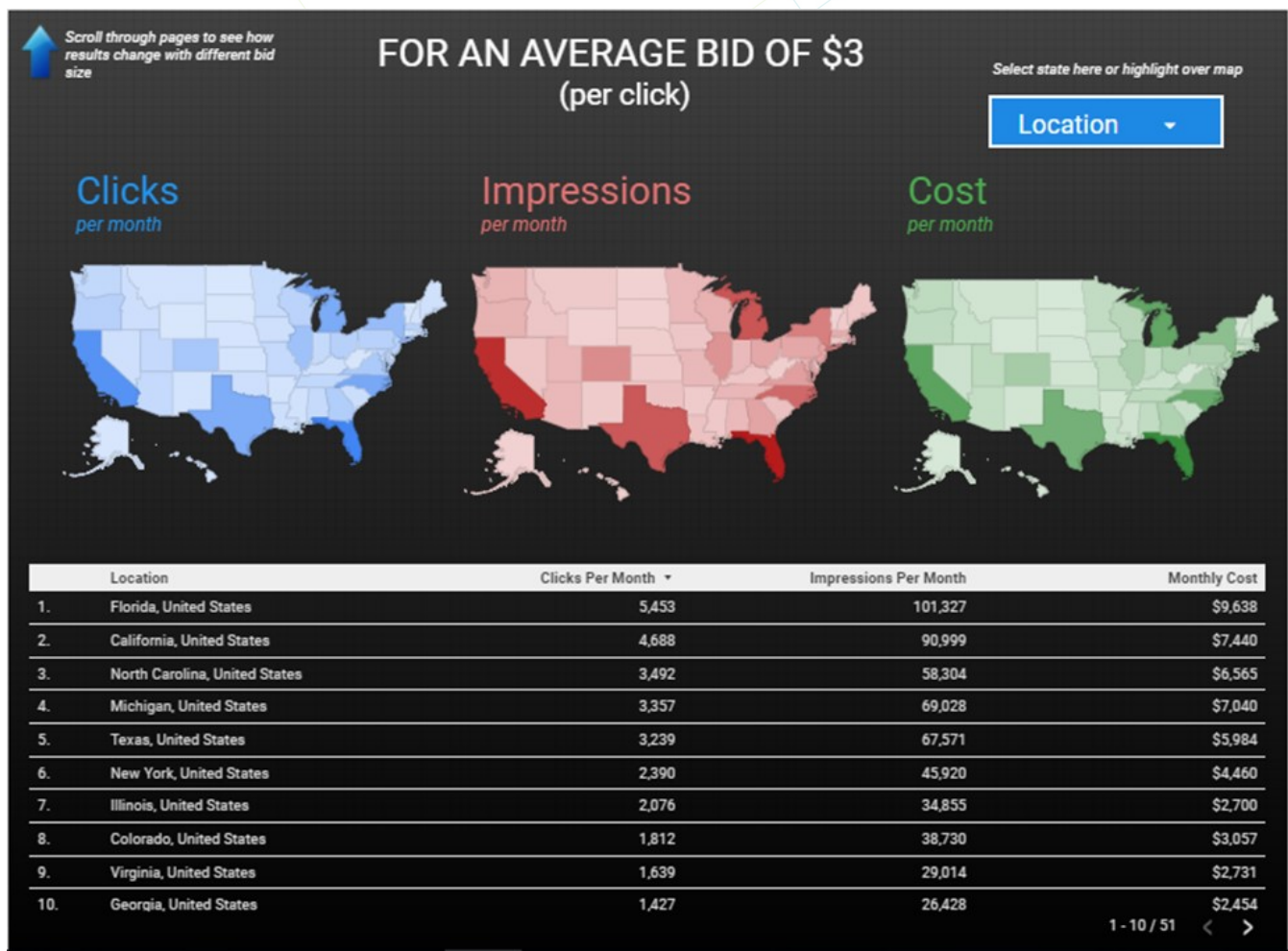
Keyword	Monthly Searches	Keyword	Monthly Searches	Keyword	Monthly Searches
risk management	27100	living trust fund	170	risk management banking	90
capital gains planning	10	estate administration	320	living will trust	90
risk management plan	2900	setting up a trust fund	480	estate executor	720
revocable living trust	5400	risk management principles	210	will or living trust	140
living revocable trust	1900	risk management assessment	110	risk strategy	3600
irrevocable trust	14800	financial risk	1600	cost of living trust	140
insurance risk management	320	probate will	1300	it risk management plan	40
risk management insurance	590	business risk	1900	probate of will	210
special needs trust	5400	process of risk management	20	trust documents	590
trusts and estates	1300	risk management agency	390	trust planning	210
irrevocable living trust	1300	probate estate	880	estates and trusts	210
financial risk management	1000	trust will	170	will estate	90
business risk management	210	risk assessment procedure	210	creating a trust	720
risk management strategies	590	risk and compliance	320	risk management practices	50
managing risk	480	risk management methods	90	living irrevocable trust	90
insurance and risk management	260	explain risk management	10	insurance risk manager	320
will planning	170	living will and testament	170	drafting a will	170
risk management and insurance	390	trust estate planning	70	trusts & estates	140
risk management program	480	revocable trust agreement	90	international risk management	70
setting up a trust	1600	estate planning strategies	70	living trust benefits	140
project risk management	880	risk assessment methodology	320	supplier risk management	170
will trust	260	compliance risk	480	probate trust	50
creating a will	2400	risk monitoring	140	whats risk management	40
capital gains tax calculator	1900	a living trust	170	trust and will	170
trust and estate planning	140	corporate risk management	260	do i need a living trust	210
probate a will	1300	risk management methodology	110	risk management applications	110
importance of risk management	140	estate planning and trusts	40	risk management conference	210
strategic risk management	170	risk mitigation strategies	590	risk and insurance management	40
risk assessment process	720	living revocable trust cost	170	online tax preparation	1600
family trust	18100	risk management firms	140	cost of a living trust	70
risk management policy	320	risk management standard	70	federal capital gains tax	1300
risk mitigation	2900	trust planning	210	family living trust	70
risk management it	40	risk management analysis	90	living trust documents	170

# Google Budget Estimates: Ad Spend by State

Google's Budget Estimate tool provides data to help you anticipate the costs of your campaigns. You will be able to spend different amounts depending on the keywords you select, how much you bid per click on each keyword, and the geography you are targeting. The interactive model below will show you the monthly cost of targeting the top industry keywords at different bid levels in each state. A higher keyword bid will cost you more per click, but your ads will show at a higher position on the search results page, providing better visibility. See how much you could be spending on the top keywords in your industry below.

[View the interactive data model here](#)

Use the interactive Data Studio model to project the maximum cost of targeting the top industry keywords in each state.



# Digital Advertising Analysis of Top Wealth Management Companies

## Morgan Stanley

Morgan Stanley - Wealth Management - [morganstanley.com](https://morganstanley.com)

 [www.morganstanley.com/](https://www.morganstanley.com/) ▼

The Path To Reaching Your Goals Begins With A Financial Advisor. Learn More.

243 Financial Advisors on the Barron's Top 1,200 List – Barron's

Morgan Stanley is running a paid search campaign for wealth management planning. The campaign is centered around financial goals, and how their financial advisors can help reach those goals. The ad copy is simple, and fits their brand well. The company has built a reputation for financial stability, and exceptional decision making. The simplicity and messaging in the ad and landing page reflect these values.

The Fidelity logo is centered at the top of the page. It consists of the word "Fidelity" in a black, sans-serif font, enclosed within a thin, light blue square border.

**Wealth planning - Fidelity Investments**

**Ad** [www.fidelity.com/](http://www.fidelity.com/) ▼

Dedicated financial professionals could help with investing solutions. Call now.

Fidelity is running a paid search campaign for investing solutions. Fidelity's advertisement is simple and straightforward, like Morgan Stanley's. Although the ad copy does not take advantage of the maximum space available, the impact is maximized through keywords. "Wealth planning", and "investment solutions" are both searched over 200 times per month. The long-tailed keyword "help with investing solutions" is searched 30 times per month.

# BNY Mellon

## Wealth Management Experts - BNYMellonWealth.com

**Ad** [www.bnymellonwealth.com/Wealth/Management](http://www.bnymellonwealth.com/Wealth/Management) ▼

Get Advice From One Of America's Leading **Wealth Management** Firms.

📍 201 Washington St, Boston, MA - Open today · 8:30 AM – 5:00 PM ▼

## Welcome to BNY Mellon - Started by Alexander Hamilton

**Ad** [www.bnymellon.com/](http://www.bnymellon.com/) ▼

The Buck Started Here. Contact **BNY Mellon** Today to Learn More.

Social Responsibility · Invested in Innovation · Global Operations

Services: Investment Services, Investment Management, Wealth Management

### Contact Us

BNY Mellon Delivers Investment Services In More Than 100 Markets.

### Who We Serve

Our Specialized Services Reach A Wide Range of Industry Segments.

### Our Services

Investment Management, Investment Services & Wealth Management.

### Our Commitment

Learn About BNY Mellon's Lasting Commitment to Positive Change.

BNY Mellon is running at least two paid search campaigns. The top campaign is focused around the keyword phrase “wealth management”. This is a highly competitive keyword phrase that is searched over 14,000 times per month. The second campaign gives more information about their company. They have an emphasis on social responsibility and commitment to positive change, while also stressing their focus on wealth management and investing success.



# Conclusion

## **Top Keywords:**

- Most searched keywords are “risk management”, “family trust”, and “irrevocable trust”.
- Bid on these keywords as well as the others listed.
- Include top keywords in your ad copy.
- Include top keywords in your landing page copy.
- Use different keyword match types to capitalize on keyword variations.

## **Ad Spend by State:**

- Bidding \$3.00 on top keywords will yield up to 5,453 clicks with a maximum monthly cost of \$9,638 depending on state.
- Bidding \$5.00 on top keywords will yield up to 6,300 clicks with a maximum monthly cost of \$14,912 depending on state.
- Bidding \$7.00 on top keywords will yield up to 6,223 clicks with a maximum monthly cost of \$17,476 depending on state.
- Bidding \$10.00 on top keywords will yield up to 6,310 clicks with a maximum monthly cost of \$20,344 depending on state.
- Higher keyword bids result in higher average ad position on Google’s search results page, resulting in higher click-through and conversion rates.
- These budgets reflect maximum potential spend. Advertisers can limit their spend to the amount suitable for their budget.

# Top 100 Wealth Management Companies Reviewed for this Report

Merrill Lynch  
Wells Fargo  
Morgan Stanley  
Edward Jones  
LPL Financial  
UBS  
Charles Schwab  
Ameriprise Financial  
Raymond James  
MML Investors Services  
USAA  
Citi  
RBC Wealth Management  
TD Ameritrade  
AXA  
STIFEL  
Credit Suisse  
JP Morgan  
Thrivent Financial  
Berkshire Hathaway  
Fannie Mae  
Bank of America  
Freddie Mac  
Goldman Sachs  
American Express  
Capital One  
Pinnacle Financial Services  
Quicken Loans  
U.S. Bank  
Baird  
First American Financial  
Chevy Chase Trust Company  
Hightower Advisors, LLC  
Oxford Financial Group, LTD  
Canterbury Consulting  
Comprehensive Financial Management, LLC  
AT Investment Advisors, Inc  
Plante Moran Financial Advisors  
Ehrenkranz Partners, LP  
Shepherd Kaplan, LLC  
Brownson, Rehms & Foxworth, Inc  
Mariner Wealth Advisors, LLC  
Innovest Portfolio Solutions, LLC  
Convergent Wealth Advisors, LLC  
Beacon Pointe Advisors, LLC  
Everett Harris & Company  
Buckingham Asset Management, LLC  
Mercer Global Advisors, Inc  
KLS Professional Advisors Group, LLC  
Baker Street Advisors  
Loring, Wolcott & Coolidge Fiduciary Advisors  
Kibble & Prentice Holding Company  
Avalon Advisors  
Clarfeld  
HPM Partners  
Cornerstone Advisors Asset Management

# Top 100 Wealth Management Companies Reviewed for this Report

Presido Capital Advisors

Mason Investment Advisory Services

Douglas C. Lane & Assoc.

CV Advisors

Ferguson Wellman Capital Management

Sontag Advisory

Welch & Forbes

BC Advisors

Halbert Hargrove

Symmetry Partners

Forbes Family Trust

Choate Investment Advisors

Wetherby Asset Management

Gofen and Glossberg

Altair Advisors

Atalanta Sosnoff Management

SEIA

Evanson Asset Management

Hewins Financial Advisors

Bartlett & Co

LourdMurray

We Family Offices

Brave Warrior Advisors

BAM Advisor Services

Balasa Dinverno Foltz

Linden Global Strategies

Bingham, Osborn & Scarborough

The Mutual Fund Store(Financial Engines)

R.M. Davis, Inc

Rehmann Financial

Wescott Financial Advisory Group

Burt Wealth Advisors

Adams Hall Wealth Advisors

Signature

Inverness Counsel

Foster Group

Bloom Asset Management

Carlson Capital Management

Segall Bryant & Hamill

BKD Wealth Advisors

Weaver C. Barksdale & Assoc.

Seven Post Investment Office

Finaccess Advisors, LLC