



On Demand Wholesaling

How to be visible... without being present...

Advisors want wholesalers to be visible... they'd just prefer that they be visible without actually being in their office.

We won't argue that advisors aren't harder to see today than ever before. There are numerous studies documenting what many of us already intuitively know...in person visits between advisors and wholesalers are down... and down pretty significantly. It seems that advisors today are getting better and better at being invisible to asset managers and product manufacturers.

And we think that technology can help manufacturers to solve this "visible but not present" riddle.

It's hard to get through an hour today without an article crossing our desk about the impact technology is having and or will be having on the advisory business. BD's are scrambling to find ways to accommodate technology and are concerned about the impact on operational margins. Advisors are trying to either adopt to or fend off technology in its' many forms. Asset managers and product manufacturers are all trying to figure out what the changes afoot in both the advisor and BD community mean to them.

But what we see very little of are articles or thought-provoking pieces on the impact technology and may have on an underappreciated but vital link in the financial services food chain.... **wholesalers**. The front line of most manufacturers communication strategy is for the most part ignored when it comes to the impact of these seismic changes. And we'd advise you not to ignore this vital link, because for every study we've read that says wholesaler visits to advisors are for the most part not desired by advisors.... we see a study that shows us that

advisors still place much of their business with the wholesalers they see most often...an interesting contradiction between the words and the action.

Advisors want you to be visible... they just don't want to see you!

So how can we respect the desire for invisibility while making ourselves all the more visible? We think that's where technology comes in. And we're not talking about handing a wholesaler an iPad and checking off the technology box next to distribution. An iPad only helps if you can get in to see the advisor.

Some of the most successful wholesalers today have basically redefined what it means to be visible. They have recognized that there are many avenues to visibility that don't always include a stop in the office of an advisor. Territory websites, on-line meetings, webinars, and social media are a few of the growing ways that wholesalers can accommodate an invisible advisor through increased wholesaler visibility.

Some may prefer the anonymity of a website search. Others may like to view webinar recordings on their own and long after the webinar concludes. This desire for information and "visibility" on their terms is truly the heart of the on-demand world we live in. Advisors, like all of us, want the information they want, when they want it and they will consume it in the most efficient way possible. The key to increasing visibility among the invisible is to provide them multiple ways for them to see you... on their terms.

To learn more about how we've applied our 35 plus years of experience to today's technology on behalf of wholesalers, [click here](#) to view a brief video description of our platform.