



Financial Planning
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Financial Planning ADVISE | AI

AI Tools for Smarter Financial Marketing

MARKETING: USING AI TO ATTRACT, ENGAGE, AND CONVERT CLIENTS

ATTRAC	ENGAGE	CONVER	AUTOMAT	BUIL
 Sora openai.com/sora	 ChatGPT chatgpt.com	 FIN AI	 Zapier zapier.com	 Google AI Studio aistudio.google.com
 Midjourney midjourney.com	 Claude claude.ai	 fin ai FINNY AI	 N8N n8n.io	 Bolt.new bolt.new
 Nano Banana gemini.google.com	 Gemini gemini.google.com	 ZACKS finny.com Zacks Insights zacksinsights.com	 Relay App relay.app	 Lovable lovable.dev
 ElevenLabs elevenlabs.io	 Grok grok.x.ai	 Agentforce salesforce.com	 Lindy AI lindy.ai	 Base44 base44.com
 HeyGen heygen.com	 Perplexity perplexity.ai		 Relevance AI relevance.ai	 Abacus AI abacus.ai
 HeyReach heyreach.io	 Genspark genspark.ai		 Taskade taskade.com	 JIFFY AI jiffy.ai
 Otterly AI otterly.ai	 Navu AI navu.co		 Super Whisper superwhisper.com	 Manus manus.ai
 Clay clay.com	 NotebookLM notebooklm.google.com		 Willow Voice willowvoice.com	
 Aura aura.build			 Nimo Infinity nimoinfinity.com	
 Gamma gamma.app				
 Beautiful AI beautiful.ai				

1. Tools to ATTRACT Clients

These tools help you create content and perform outreach to find new clients and bring them into your funnel.

AI Content & Media Generation

Gamma:

- *Advisor Example:* Create a personalized visual proposal, "Our Plan for Your Retirement," in 5 minutes from a text outline.
- *Marketing Example:* Generate a professional-looking "Market Outlook Q4 2025" webinar deck instantly.

Beautiful AI:

- *Advisor Example:* Quickly design a polished "College Savings Strategies" seminar presentation that looks like a design agency made it.

Midjourney:

- *Marketing Example:* Generate custom, aspirational images for a blog post like "What Does Financial Freedom Look Like?" without using generic stock photos.

HeyGen:

- *Advisor Example:* Create a short, personalized intro video ("Hi [Prospect Name], I'm looking forward to our meeting...") to include in a LinkedIn connection request.
- *Executive Example:* Record a 3-minute script and have it translated into 5 languages with a clone of your own voice to share a firm update with global partners.

Sora:

- *Marketing Example:* (Future-looking) Create a compelling 30-second brand ad showing the *feeling* of a secure retirement, like a couple's journey from their first home to their retirement party.

ElevenLabs:

- *Marketing Example:* Create an audio version of the firm's weekly market newsletter to turn it into a podcast.
- *Compliance Example:* Use voice cloning (with approval) to record a standard audio disclaimer once, and then programmatically add it to any custom video an advisor records.

Aura (aura.build):

- *Marketing Example:* Quickly prototype a new landing page for a "First-Time Homebuyer's Guide" to capture leads, then send the design to developers.

Nano Banana (Gemini Feature):

- *Marketing Example:* Create a professional, friendly, and consistent set of AI-generated headshots for the "Our Team" page of the firm's website.

AI Prospecting &

Outreach Clay:

- *Advisor Example:* Build a list of local business owners who recently received funding (a "money-in-motion" signal) and find their contact info to offer business succession planning.

HeyReach:

- *Marketing/Support Staff Example:* Automate LinkedIn connection requests and initial follow-ups for an upcoming "Retirement Planning" webinar hosted by an advisor.

Otterly AI:

- *Marketing Example:* Ask "What is the best financial advisor in [My City]?" to see if the firm is mentioned by AI chatbots and, if not, adjust the website's SEO.
- *Compliance Example:* Monitor what AI chatbots say about the firm's proprietary funds to check for brand misrepresentation.

2. Tools to ENGAGE Clients

These tools help you nurture leads, answer questions, and build relationships by providing personalized, valuable interactions.

AI Chatbots & Research Assistants

ChatGPT:

- *Advisor Example:* "Draft a 3-part email nurture sequence for a 40-year-old prospect who downloaded our '529 Plan Guide,' focusing on the benefits of starting early."
- *Marketing Example:* "Give me 10 ideas for a blog post about the new SEC regulations on wealth management."

Claude:

- *Advisor Example:* Upload a 100-page prospectus for a mutual fund and ask, "Summarize the key risks and fee structure for a client who is moderately risk-averse."
- *Compliance Example:* "Upload our latest marketing email. Does any language in this draft make a specific performance promise or guarantee?"

Gemini:

- *Advisor Example:* "What are the biggest financial concerns for dentists in 2025? Find me some recent articles I can reference in my next client newsletter."

Grok:

- *Advisor Example:* "What are high-net-worth individuals on X talking about regarding the recent capital gains tax proposal? What is the current sentiment?"

Perplexity:

- *Support Staff Example:* "What are the 2025 contribution limits for a 401(k), SEP IRA, and Roth IRA, with sources?" (for quick, verifiable answers).

Genspark:

- *Marketing Example:* "Create a one-page research summary on 'ESG investing trends' that our advisors can use to start conversations with clients."

Client-Facing Engagement

Tools Navu:

- *Marketing Example:* Install on the firm's website so a prospect can ask, "Do you offer flat-fee planning?" and get an instant, accurate answer, qualifying the lead.

NotebookLM:

- *Advisor Example:* Upload all your past research notes and client-approved articles. Ask, "What are the 3 best talking points I have for a client worried about inflation?"
- *Operations/Support Staff Example:* Upload the firm's 50-page internal operations manual. Ask, "What is the step-by-step process for submitting a client's change of beneficiary form?"

3. Tools to CONVERT Clients

These tools help you close the deal, support existing clients to increase retention (a form of conversion), and manage the systems that lead to a "yes."

Fin AI (by Intercom):

- *Operations/Support Staff Example:* An AI agent that *converts* (retains) clients by instantly answering website chat questions like, "How do I roll over my old 401(k)?" or "Where can I find my 2024 tax forms?"

FINNY AI:

- *Advisor Example:* A specialized tool to *convert* leads. It identifies high-probability prospects (e.g., someone who just sold a business) and automates the initial, personalized outreach.

Zacks Insight:

- *Advisor Example:* Use it during a client meeting: "My client is asking about [Stock Ticker]. Let's analyze its recent performance and analyst rating" to provide instant, data-backed validation.

Agentforce:

- *Operations Example:* Build an AI agent that automatically follows the 10-step new client onboarding process—from sending the e-signature docs to scheduling the first review and notifying compliance.

4. The "Smarter Marketing" Infrastructure

These tools are the "back-end" that makes you smarter, connecting your "Attract, Engage, and Convert" systems and automating your internal work.

Workflow Automation (Connecting Your Funnel)

Zapier:

- *Marketing Example:* When a prospect fills out the "Download Our Guide" form on the website (Attract), automatically add them to a Mailchimp nurture sequence (Engage) and create a "To-Do" for an advisor in your CRM (Convert).

N8N:

- *Operations Example:* A more technical version of Zapier. Build a workflow that pulls new client data from the CRM, creates their secure folder in a cloud drive, and sends a "Welcome" packet.

Relay.app / Lindy:

- *Support Staff/Advisor Example:* Create an AI agent that reads your inbox, identifies all "Schedule a meeting" requests, finds a time on your calendar, and drafts the reply for you to approve.

Relevance AI:

- *Marketing Example:* Build a custom agent that "listens" to 100 industry podcasts, finds mentions of "retirement planning," and summarizes the key topics for your content team.

Personal & Team

Productivity Taskade:

- *Marketing Example:* Map out the entire Q1 marketing campaign—from blog posts to social media to the webinar—in one visual, AI-assisted project plan.

Superwhisper / Willow (willowvoice.com):

- *Advisor Example:* After a client call, dictate a 3-paragraph follow-up email and create a detailed CRM note in 30 seconds instead of 10 minutes of typing.
- *Executive Example:* Quickly respond to a dozen internal emails while walking between meetings, just by using your voice.

Nimo Infinity:

- *Advisor Example:* Create a single "dashboard" that shows your ChatGPT prompt for email, your Perplexity window for research, and your Clay list for prospecting, all in one place.

5. Build Your Own Marketing Tools

For when you're ready to build your own custom AI marketing solutions.

Google AI Studio:

- *Operations/IT Example:* Build a prototype for an internal tool that uses AI to read compliance documents and answer staff questions.

Bolt.new / Lovable / Base44:

- *Marketing/Executive Example:* "Build me a simple web app that works as a 'Retirement Savings Calculator' that we can embed on our website to *attract* and *convert* leads."

Abacus AI / JIFFY AI:

- *Executive/IT Example:* (Enterprise-level) Build a custom, real-time AI model that predicts client churn risk based on their portfolio, login activity, and support interactions.

Manus:

- *Operations Example:* (Future-looking) An autonomous agent that can perform complex tasks like, "Research the top 5 emerging market ETFs, compare their fee structures and 3-year performance, and draft a memo for the investment committee."