
Platform plays matchmaker between fiduciary advisors and prospects

By Editorial Staff Thu, May 19, 2016

Participating NAPFA advisors can obtain onboarding services at a discounted rate. These include developing messaging for videos and shooting the videos to be included with the advisor profile, as well as discounted annual platform fees.

GuideVine Technologies, Inc., an online platform that helps consumers find a right-fit financial advisor, announced an alliance with the National Association of Personal Financial Advisors (NAPFA).

GuideVine, which was founded by former McKinsey & Co. consultants and software entrepreneurs, said in a release that it can serve as a digital marketing partner for financial advisors, enabling them to:

- Reach prospects through the platform.
- Get help crafting marketing messages and content.
- Outsource digital marketing chores.

Participating NAPFA advisors can obtain onboarding services at a discounted rate. These include developing messaging for videos and shooting the videos to be included with the advisor profile, as well as discounted annual platform fees.

In addition, GuideVine will conduct a digital marketing consulting review to help strengthen the advisor's various online profiles. NAPFA advisors will also be included on the new fee-only/NAPFA specific portion of the GuideVine site to further promote their fiduciary standing.

Consumers can use Guidevine to evaluate more than 250 pre-screened financial advisors from firms that collectively manage over \$50B in assets. Consumers can access videos, profiles, community experiences, advisor regulatory histories and authenticated reviews from their personal network on GuideVine.com.

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