Rebuilding Organic Growth in the Age of Digital First Impressions

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Key Takeaways

- In today’s advisor landscape, making a polished digital presence is critical to earning trust.
- Organic growth has shifted from word of mouth to web-first impressions, requiring advisors to align their credibility with how prospects actually evaluate them today.
- Advisors can modernize growth by leveraging WisdomTree’s Digital Presence Accelerator and FINNY’s intent data platform to turn online visibility into measurable client engagement.

Let's begin with a fundamental shift: organic growth isn't just about referrals anymore—it's increasingly driven by digital impressions.

For decades, growth was straightforward: do great work, earn client introductions and let your reputation carry forward. That foundation still matters, but today, it's only one piece of the equation.

Digital Presence: The New First Meeting

Even the warmest referral now triggers a cold search. Before ever reaching out, today's prospects are Googling your name, reviewing your website and browsing your LinkedIn. According to WisdomTree research,1 **nearly threeout of fourprospects say online information plays a decisive role** in their selection process. And nearly **half have ruled out an advisor entirely** based solely on their digital presence—or lack thereof.

Trust is now built—or lost—before you get the chance to speak.

Why Your Online Presence Matters (Even with Referrals)

Referrals used to be the finish line. Now, they're just the starting point.

Most prospects receive two to three advisor names and then do their own due diligence. It's not just younger clients doing this. Our research shows:2

- **61% of boomers**
- **83% of Gen X**

- **92% of millennials**

validate advisor referrals online before reaching out.

And among investors under 44, **only 17% feel a referral is required** to hire an advisor.3 They're looking for credibility, clarity and connection—online.

How to Show up Online

A strong digital presence isn't about self-promotion. It's about earning trust and delivering clarity. Based on our insights from more than 5,000 prospects, here are the elements that make the biggest impact:4

- **Professional photos** with warm expressions and polished attire
- **Messaging** that clearly explains who you help and how
- **Trust signals**, like media coverage or third-party endorsements
- **Prominent calls-to-action** that guide next steps
- **Short videos**—*78% of prospects prefer seeing one before reaching out*5

Where WisdomTree Helps

At WisdomTree, our support goes well beyond ETFs and model portfolios. Through our **Advisor Solutions platform**, we help advisors grow and scale their businesses with modern, research-backed resources.

One example is our **Digital Presence Accelerator**—a customized report that evaluates your website, LinkedIn profile, Google visibility and local listings. You receive a personalized score and clear, actionable steps to elevate your digital footprint, enhance credibility and convert more interest into outreach.

This is part of our broader strategy: empowering advisors with tools that align investment excellence with business growth.

Where FINNY Fits In

To build on that support, we've welcomed Eden Ovadia of **FINNY** as a thought leader to our Advisor Solutions Platform. FINNY's **Intent Search** platform shows what's possible when intent data, lead enrichment and omnichannel outreach are unified in a single workflow.

Powered by more than **1.8 billion proprietary intent signals**, FINNY enables advisors to identify and engage with in-market prospects—through email, LinkedIn, voicemail and more—*without adding to their team*. FINNY equips advisors to act on the principles above without adding headcount—but the discipline works whether you use FINNY, another vendor or your own tech stack.

The Future of Organic Growth

Organic growth hasn't disappeared—it has simply migrated. The firms gaining traction today are the ones meeting prospects where they are: online. They're building digital credibility, layering in data-driven outreach and turning first impressions into meaningful conversations.

If your growth strategy still depends solely on referrals, now is the time to rethink how you're being found—and what prospects see when they find you.

Let's make sure your digital first impression is a powerful one.

Explore WisdomTree's Advisor Solutions platform or email us at WTPG@wisdomtree.com to request your Digital Presence Accelerator.

1 WisdomTree, "Website Biometric Research Study," September 2020.

2 WisdomTree, "Wealth Management Research Study," August 2018.

3 FiComm Partners, "2024 Consumer Insights Study—Digital Marketing in Wealth Management."

4 WisdomTree, "Wealth Management Research Study," May 2020, 2019 Doublebase Gfk MRI Weighted to Population.

5 Wyzowl's 2025 Video Marketing Statistics report.

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