

# The Impact of COVID-19 on Financial Advisors

78% of advisors view this crisis as different from past downturns.

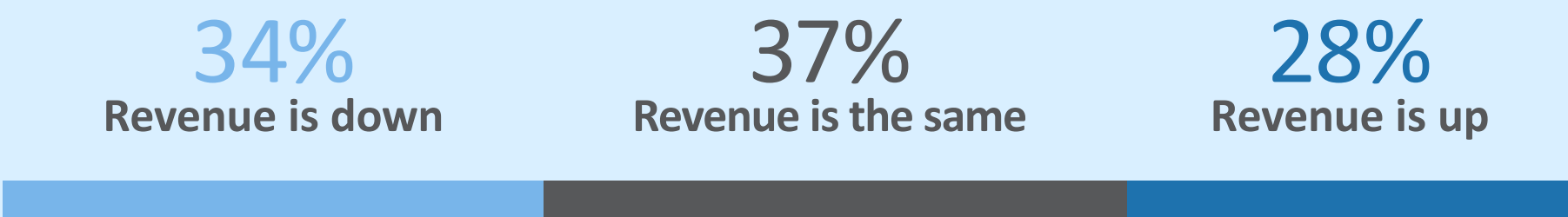
Most report disruptions to business development and operations since the pandemic began.

75%  
SAY BUSINESS DEVELOPMENT  
AND MARKETING ARE NOW  
MORE CHALLENGING.

53%  
SAY OPERATIONS AND  
ADMINISTRATION ARE NOW  
MORE CHALLENGING.

The majority of advisors report that revenue is unchanged or increased.

Impact of COVID-19 on Advisors' Monthly Revenue (% of Advisors)

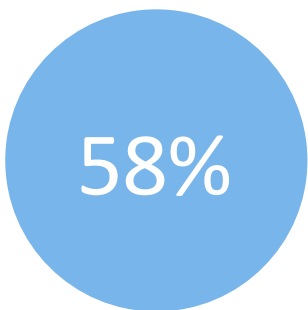


Advisors whose revenue is up since the pandemic report doing two things differently than their peers.

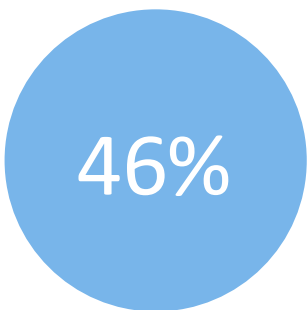
51%  
SAY THEY HAVE INCREASED  
EQUITY ALLOCATIONS.

49%  
SAY REMOTE INTERACTIONS HAVE  
MADE THEM MORE EFFECTIVE.

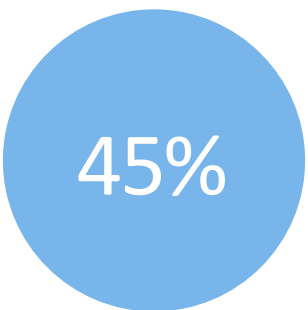
Advisors are seeking practice management support and client-ready materials.



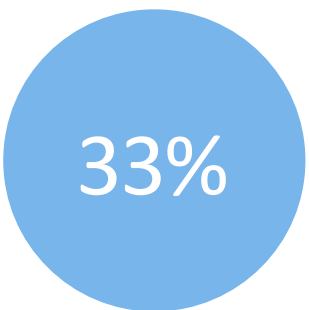
Generating referrals



Prospecting tools and ideas



Digital marketing strategies



Social media tactics



**Opportunity for asset managers and financial providers:**

*Help advisors adapt their operations, marketing, and business development activities*