



CRAFT ON TAP

MARKETING PODCAST

6 Best Practices for Financial Advisor Video Marketing on YouTube

Featuring Stephen Beach & Faustin Weber, Craft Impact

YouTube is still a powerful opportunity for financial advisors. From reaching the right audience to creating better videos and building stronger conversion paths, these six practices can help turn your channel into a more effective marketing tool.

01



Know Your Audience

Create content for pre-retirees and retirees 60+. Focus on the retirement questions and concerns they already have.

02



Set Up Your Channel

Decide whether the channel should center on the advisor or the firm. Optimize your description, keywords, links, playlists, and branding.

03



Nail the Thumbnail & Title

Use expressive thumbnails and short, specific titles that create curiosity and speak to a problem or fear your audience has.

04



Hook Them in 30 Seconds

Lead with the problem you're solving, not your credentials. Save your introduction for later in the video.

05



Repurpose Into Shorts

Turn each long-form video into 3–6 Shorts to extend its reach without creating an entirely separate production process.

06



Multiple Conversion Paths

Don't rely on one CTA. Pair a primary CTA, like booking a call, with a lower-commitment option like a guide or checklist.

