



FMG Suite Rebrands to FMG and Announces New Offerings for Financial Advisors

New Brand Reflects the Cumulative Impact of Its Acquisitions, Industry-Leading Thought Leadership, and New Product Enhancements

SAN DIEGO, Calif., May 3, 2022 – FMG Suite, a SaaS company specializing in marketing software and services for financial advisors, today announced the introduction of innovative enhancements to its platform and a refresh of its brand to reflect its increasingly prominent position as a marketing thought-leader. The company also announced its decision to empower customers to purchase its popular marketing and website products separately.

“The role of digital marketing for financial advisors has changed drastically in the last two years. It has gone from being optional to mission-critical and many advisors are feeling overwhelmed,” said Scott White, CEO. “We are addressing this with our new mobile-enabled and AI-powered content tools that make it easy for advisors to access and share timely content from their phones. And for those who would rather delegate, we’re introducing a “Do It For Me” offering led by marketing thought leaders Samantha Russell and Susan Theder.”

New platform enhancements:

- **Mobile App.** This award-winning app gives advisors access to its entire customizable content library including AI-driven curated content from the most well known media outlets. The app sends the advisor an alert when timely content is posted, and it can be shared to their email lists and social media sites with a simple swipe on their phone.
- **“Do It For Me”.** FMG’s thought leaders, Samantha Russell and Susan Theder will develop a monthly marketing plan, and populate it with exclusive content authored by them, complimented by their picks of the best content from our award-winning content library. A team of marketing consultants will execute the entire program on the advisor’s behalf.
- **Inline Website Editing.** The combination of the FMG and Twenty Over Ten website platforms has created one of the most sophisticated and easy-to-use website editing experiences available in the wealth management industry. Advisors now can edit webpage content in real-time, with no need to preview or edit offline, while still maintaining the ability to create new designs and sections without any coding. Advisors see their edits as they are made, saving significant time and effort.

- **Video Blog.** Advisors can upload a video blog to the platform and FMG will automatically create an animated GIF that can then be shared through email, social media, and websites with the push of a button.
- **Reputational Management.** FMG's Reputational Management tool, currently in beta with a group of RIAs, enables advisors to automate the sending of Net Promoter Score (NPS) surveys to clients and have the results aggregated and categorized from negative to positive within a custom dashboard integrated within the FMG platform. To help advisors capitalize on the new SEC Marketing Rule allowing testimonials, the tool can also enable advisors to trigger an email requesting a google review based on achieving a certain NPS threshold.

Rebrand

The rebrand reflects the cumulative impact of FMG's acquisitions, marketing thought leadership, and new product offerings. The addition of industry executives, Samantha Russell and Susan Theder, as well as senior hires in enterprise technology, sales, and relationship management, has enhanced the company's ability to infuse products and technology with marketing best practices and enterprise know-how.

Susan Theder, Chief Marketing and Experience Officer at FMG said, "Our rebrand coupled with the launch of these cutting-edge capabilities reinforce our mission to make it easy for financial advisors to market authentically and most importantly, effectively. Our new motto, "Our expertise is showing off yours" captures the essence of what we do for advisors. We are leading with our marketing expertise and have a technology platform that's designed to enable the execution of those best practices across every channel and medium."

In addition to the new brand identity, FMG has also released new product packages that allow customers to purchase its popular marketing automation and website products separately.

"The separation of websites and marketing tools enables us to create an ascendant journey for advisors whether they are just starting out or are at the highest level of marketing sophistication. It simplifies our offering and makes it easy for an advisor to pick the package that best meets their business goals whether that's marketing their business, modernizing their website, or both," said Dave Christensen, Chief Product Officer of FMG.

About FMG

FMG powers an all-in-one marketing platform that helps more than 40,000 financial advisors and insurance agents attract new leads, stay connected with clients and grow

their businesses. FMG creates 200+ new pieces of authentic content for its library each month and delivers more than 25 million emails for their clients monthly. Rated first in market share and customer satisfaction three years in a row by T3 Software Survey Report, FMG helps its customers develop comprehensive marketing strategies and automate their most effective marketing tactics. FMG is headquartered in San Diego, CA, with satellite offices across the United States. For more information, please visit www.FMGsuite.com

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