

# 2026 Financial Webinar Insights Report & Growth Guide

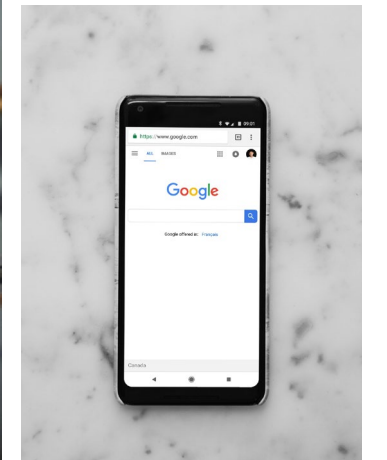
Onimod Global

[www.onimodglobal.com](http://www.onimodglobal.com)



# Performance Digital Marketing Agency

Since 2009, we've been scaling businesses globally with trailblazing, data-driven digital marketing strategies, state-of-the-art technology, and transformation growth solutions.



# 500M+

+  
Ads Delivered in 24'

25+ countries in 8 languages

# \$50B+

Assets Presented since 2020

in all Financial Services marketing programs

# \$60M+

Paid Media Managed in 24'

on Meta, Google, LinkedIn, X, Pinterest, Microsoft +

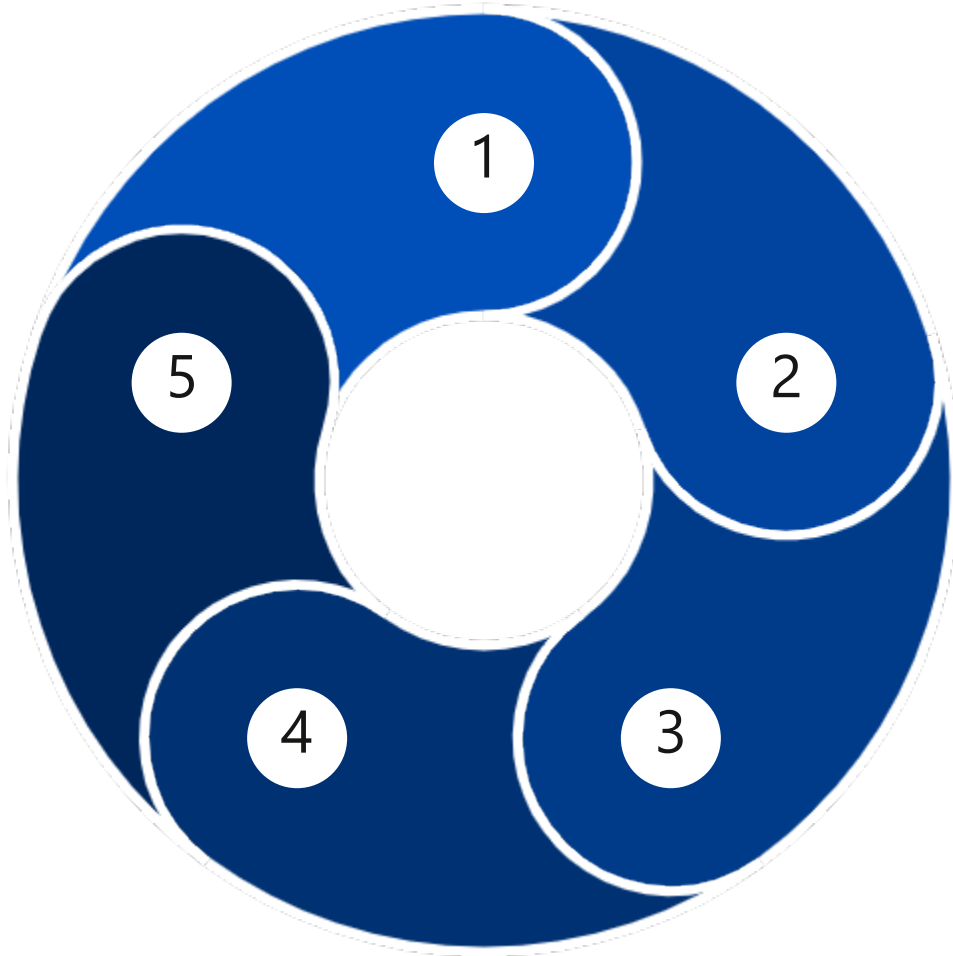


**Onimod Global**  
DIGITAL MARKETING

# 2026 Financial Services Growth Guide

# 5 Keys to Predictable Growth

Scale your financial advisory with industry leading digital marketing strategies.



1

## Graphic, Video & Website Design

Create visually stunning, branded graphics, videos and websites to support your marketing efforts and elevate your brand's image.

2

## Paid Ad Management

Expertly manage and optimize your paid advertising campaigns across various platforms to drive targeted traffic and conversions.

3

## Social Media Management

Implement a comprehensive social media strategy, including both paid and organic tactics, to enhance your online presence and reach your target audience.

4

## Email Marketing

Craft personalized, automated email campaigns to nurture leads, retain customers, and drive repeat repeat business.

5

## Content Marketing

Develop and publish high-quality, engaging blog content to establish your brand as an industry industry thought leader and attract organic visitors.

# Webinar

## Innovations

Evergreen & Automated | SMS | Messenger | AI Voice Calling  
Calling

# Paid Ad

## Opportunities

VSLs & Custom Funnels | Local Business Advertising  
Advertising

# Automated

## Prospecting and Directory Tools

AI for LinkedIn Prospecting | Business Profile Optimization



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# Webinar Innovations

Attract. Engage. Convert.



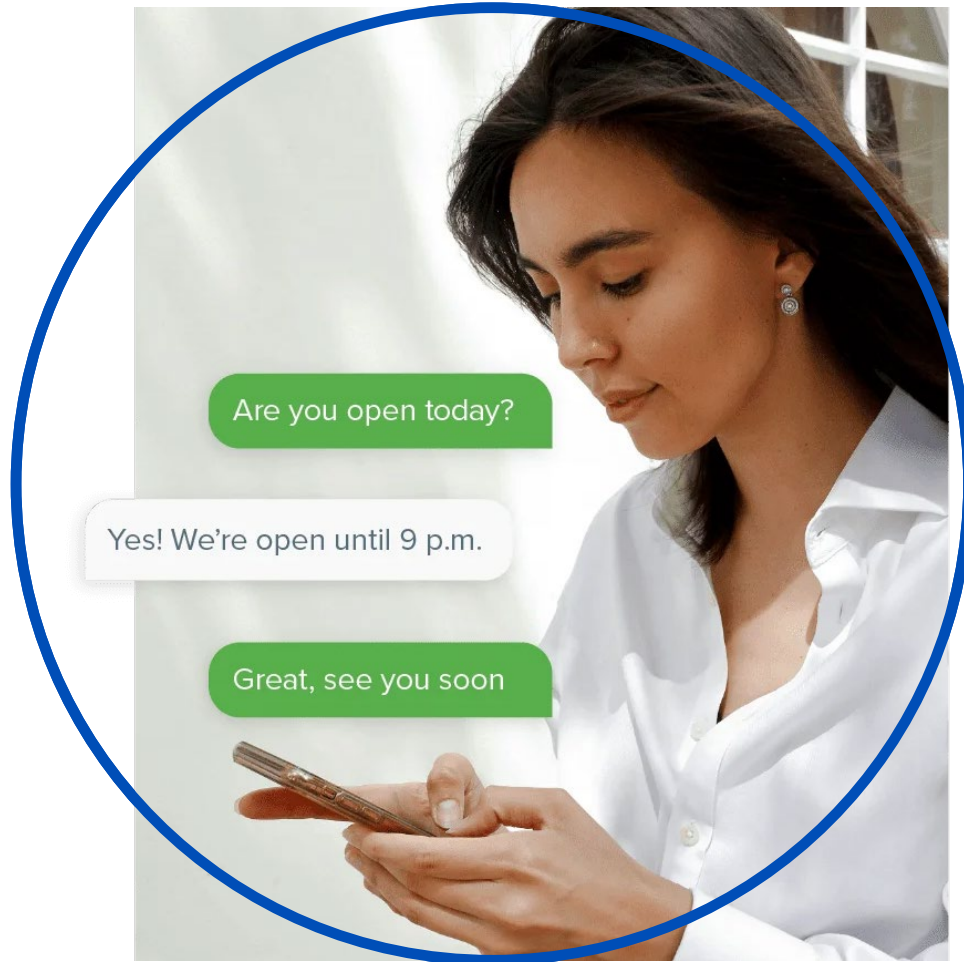
## Evergreen Webinars / Automated Events

- Scaling outreach while maintaining engagement.
- Personalized, Yet Scalable – Pre-recorded sessions can still feel interactive with Q&A follow-ups, automated chat responses, and scheduled follow ups.



# Webinar Innovations

Attract. Engage. Convert.

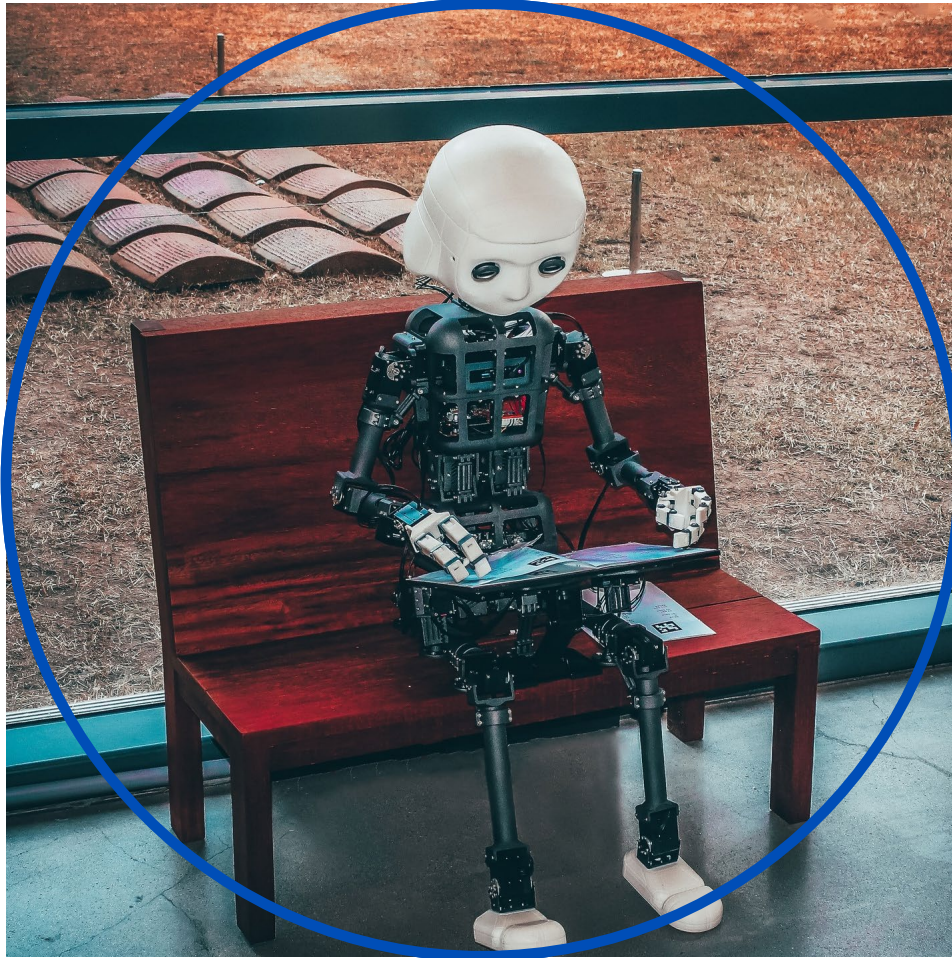


## SMS Communication Upgrades

- Pre-scripted and compliant replies for FAQs while still offering personalized responses when needed.

# Webinar Innovations

Attract. Engage. Convert.



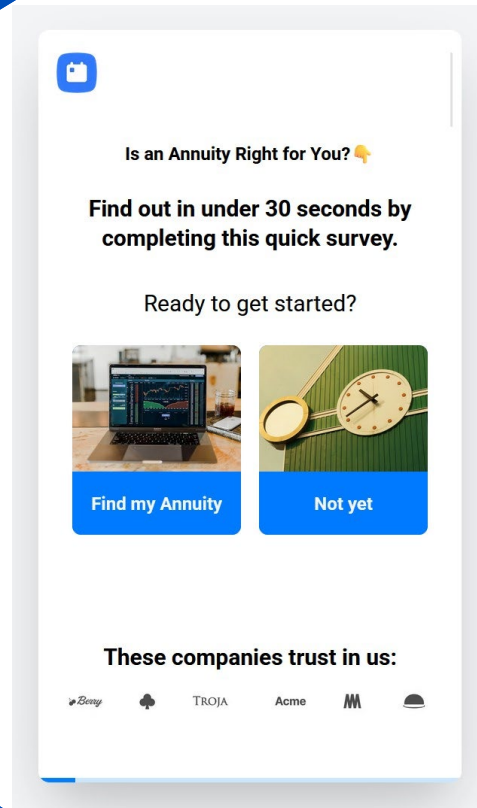
## AI Voice & Messenger Communication

- Personalized Yet Scalable – AI-driven voice calls remind registrants about upcoming webinars
- Automated Messenger Integration with Multi-Channel Outreach



# Paid Ad Opportunities

Attract. Engage. Convert.



## VSL's & Custom Funnels

- Optimized lead generation with the latest lead capture technology and methodology.
- Seamless Conversion Path - the funnel guides prospects step by step toward scheduling with an advisor.



# Paid Ad Opportunities

Attract. Engage. Convert.



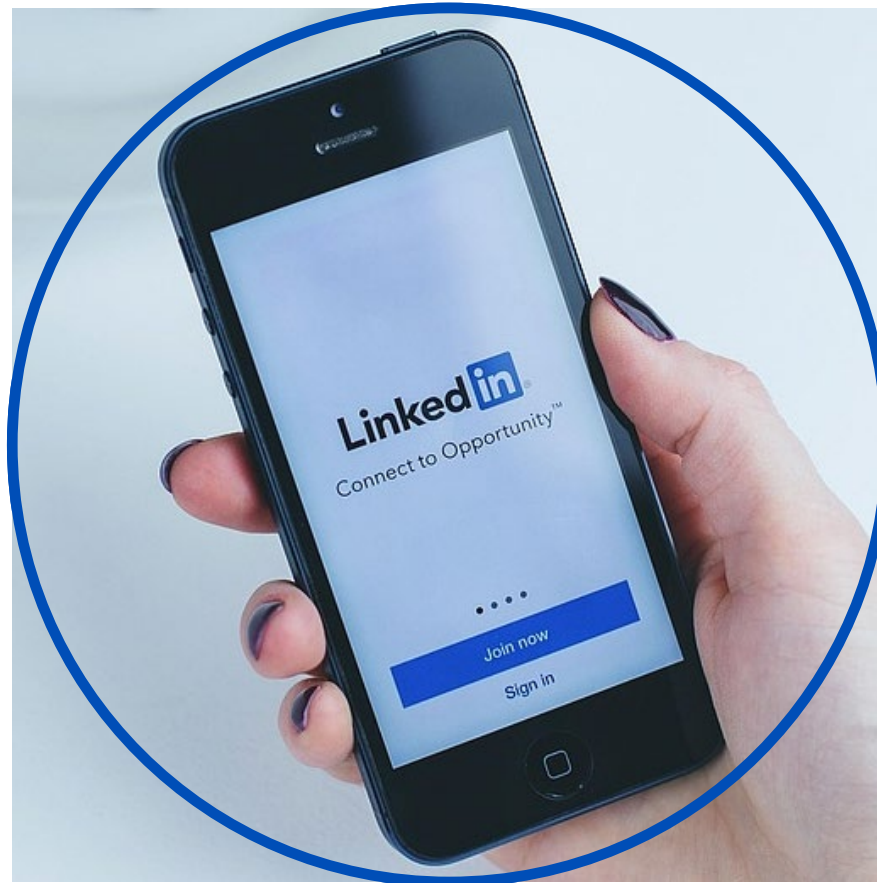
## Local Business Advertising

- Dominate Local Search Results with Google Ads and GLSA
- Google Local Services Ads (GLSA) – Pay-per-lead (not per click) model
- Enhanced Credibility with Google's "Google Screened" Badge



# Automated Prospecting and Business Visibility Tools

Attract. Engage. Convert.

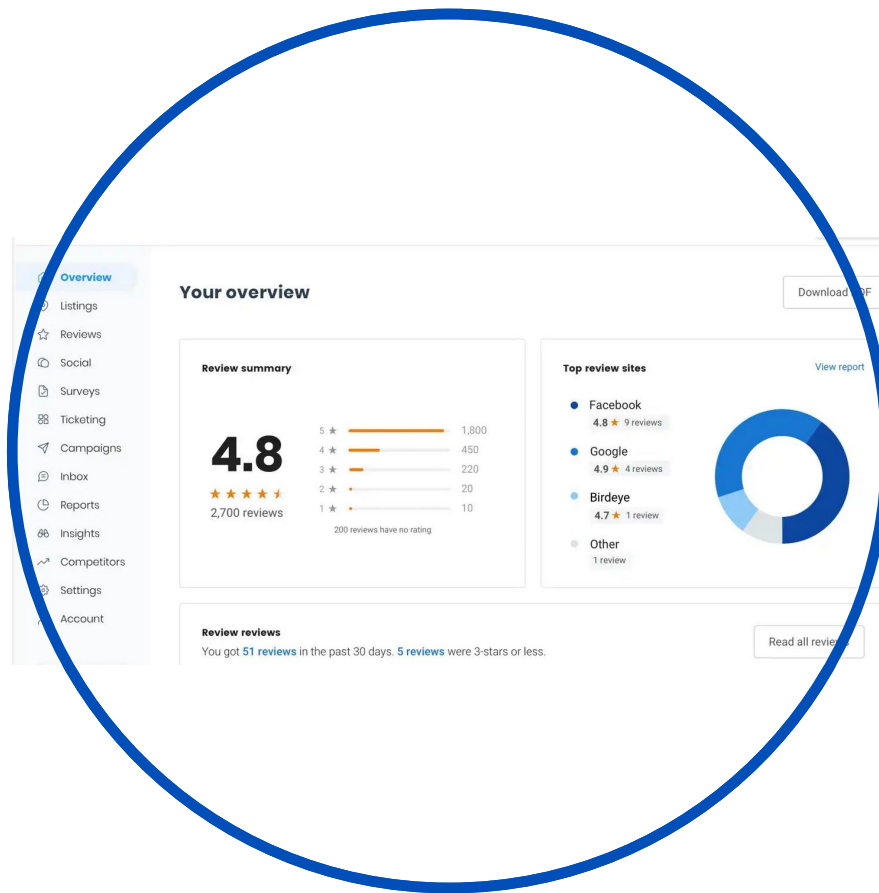


## AI for LinkedIn Prospecting

- Effortless Lead Generation – AI-driven LinkedIn prospecting automates personalized outreach to high-net-worth individuals.
- Scalable, Hands-Free Networking
- Hyper-Targeted Connection Requests with Manual Replies

# Automated Prospecting and Business Visibility Tools

Attract. Engage. Convert.



## Business Profile Optimization

- Boost Local Search Rankings
- Enhance Trust with Verified Reviews
- Improve Google Business & Map Rankings
- Centralized Reputation & Business Details Management

# Comprehensive Digital Marketing for Financial Advisors

Attract. Engage. Convert.

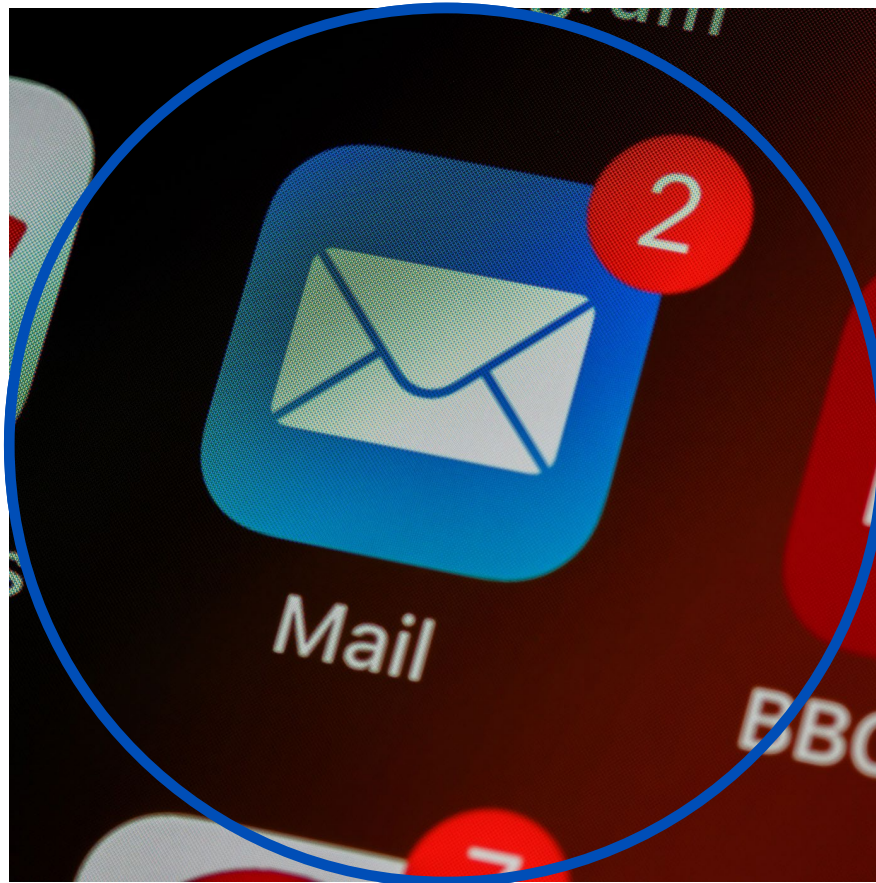


## Organic Social Media Management & Paid Advertising

- Consistent, Professional Presence – Regularly scheduled posts position financial advisors as thought leaders, keeping them top-of-mind for prospects.
- Boost Reach with Paid Ad Amplification – High-performing organic posts can be turned into targeted ads, reaching ideal clients without overspending.

# Comprehensive Digital Marketing for Financial Advisors

Attract. Engage. Convert.

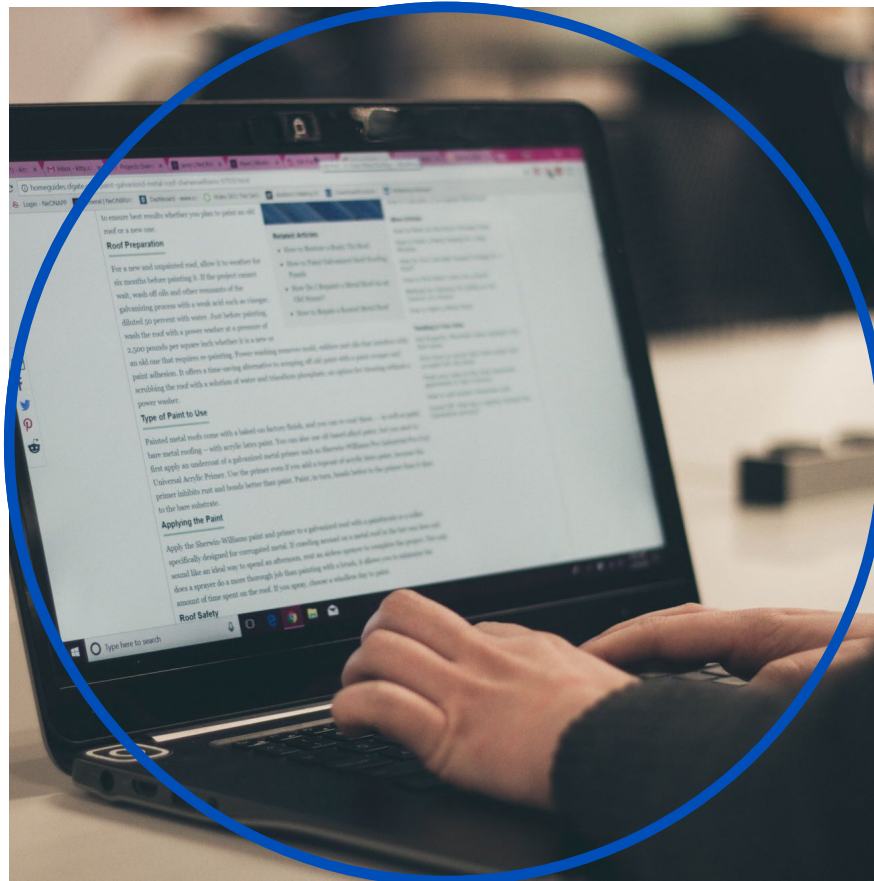


## Email Marketing Management

- Nurturing Prospects & Strengthening Client Relationships
- Automated Lead Nurturing
- Personalized Content for Higher Engagement

# Comprehensive Digital Marketing for Financial Advisors

Attract. Engage. Convert.



## Content Marketing

- Establishing Thought Leadership & Driving Organic Traffic
- Boosts SEO & Google Rankings
- Positions Advisors as Trusted Experts
- Provides Evergreen Lead Magnets A
- Aligns with Paid Ad & Social Media Strategy



# The 2026 Financial Webinar Insights Report

How Today's Affluent 55+ Audience Engages,  
Engages,  
Learns, and Chooses Financial Advisors

*Published: Oct 2, 2025 by Onimod Global & AdvisorMatch®*

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This survey was conducted the week of Oct 2nd, 2025 with a targeted audience of U.S. adults aged 55+, earning \$200K+ annually, to better understand their financial learning preferences, advisor selection process, and engagement with financial webinars.

## Question 1

# Which of the following best describes your preferred way to learn about financial planning or retirement advice?

📌 Key Takeaways for Your Webinar Strategy:

💡 One-on-One Consultations Dominate (48.4%)

The overwhelming majority prefer direct, personalized financial guidance.

Opportunity: Position webinars as a gateway to personal consultations ("Learn today, consult tomorrow!").

Next Step: Test CTA offers that emphasize scheduling a private consultation after attending a webinar.

💡 Webinars & Online Seminars Rank Third (15.6%)

Webinars are still a preferred learning format but aren't the top choice.

Opportunity: Improve webinar relevance by framing them as interactive & personalized experiences.

Next Step: Leverage live Q&A, polls, or case studies to make webinars feel more tailored & engaging.

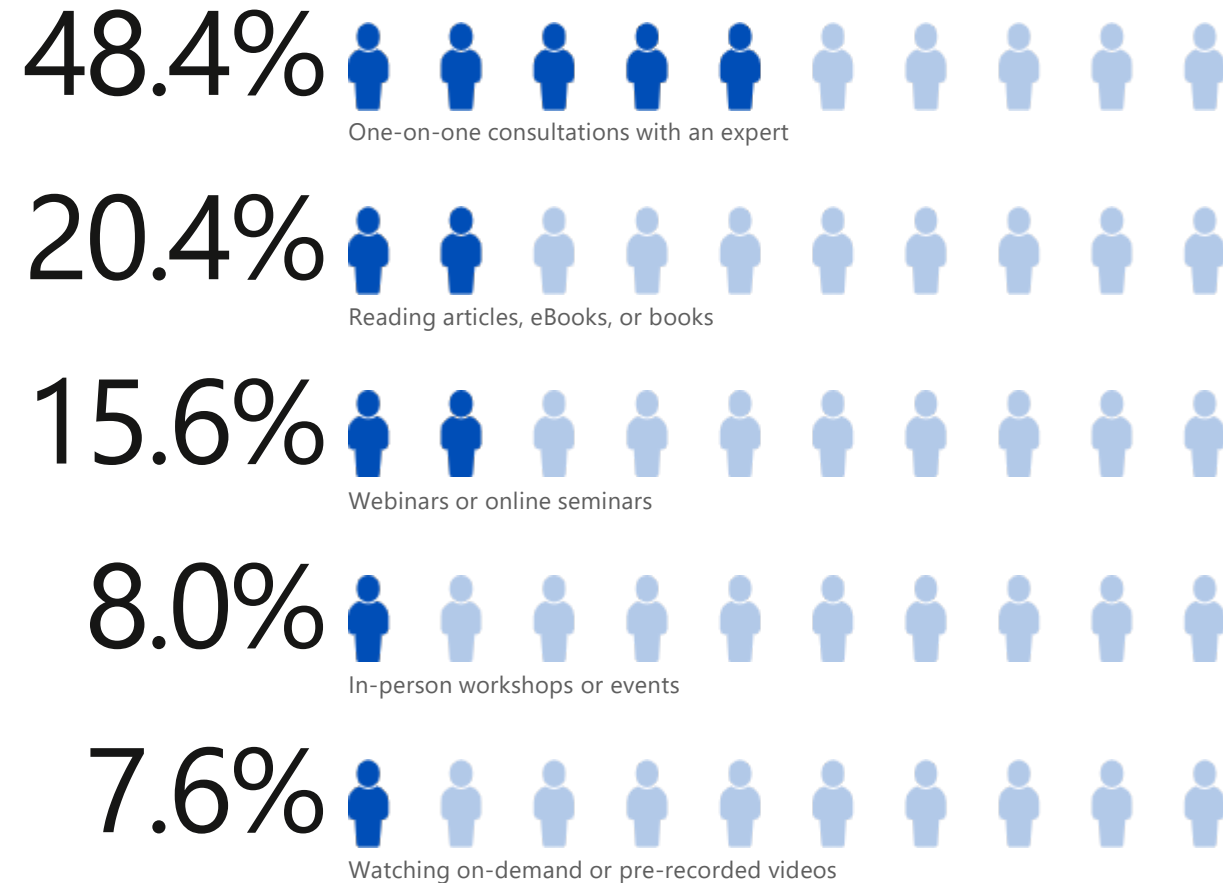
💡 Articles & eBooks Perform Better Than Webinars (20.4%)

Many respondents prefer self-guided learning through reading.

Opportunity: Pair webinars with supporting materials (guides, PDFs, checklists). Next Step: Test offering a free eBook or guide to registrants as an incentive to attend.

💡 Video & On-Demand Learning is Underutilized (7.6%)

Video learning is the least preferred, suggesting on-demand financial content may not be as effective for engagement.



## Question 2

# How long do you typically spend evaluating a new financial advisor before deciding whether you trust them?

### ✦ Key Takeaways for Financial Advisors & Webinars

💡 More Than Half of Respondents (56.8%) Are Open to Switching or Choosing a New Advisor

25.6% take a few weeks to decide, and 18% decide in just one meeting.

These individuals represent the strongest opportunity for advisors to attract new clients.

💡 A Large Percentage (28.4%) Are Loyal to Their Current Advisor

Nearly 3 in 10 respondents are not actively looking for a new advisor.

Webinars targeting this group should focus on long-term financial planning and specialized strategies rather than direct conversion.

💡 18.4% of Respondents Don't Have an Advisor Yet—A Huge Opportunity

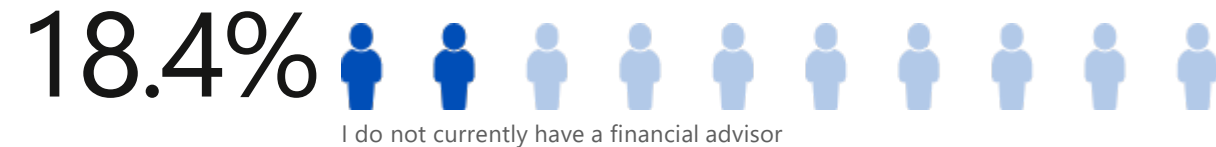
Positioning webinars as a way to "meet & learn from trusted financial experts" can help convert this audience.

Advisors can use webinars as a non-intimidating entry point to a first conversation.

💡 Only 9.6% Spend a Full Month or More Deciding

Most prospects make decisions within a few meetings.

This means advisor follow-ups should happen quickly—long gaps between conversations may result in lost opportunities.



### Question 3

Which of the following have you done in the past 6 months to learn about or find financial advice? (Check all that apply)

✦ Key Takeaways for Financial Advisors & Webinars

💡 24% Have Scheduled an Online Meeting – This is Where Webinars Can Help

Nearly 1 in 4 people booked a meeting online without needing an in-person interaction.

Opportunity: Webinars can act as a stepping stone to booking that meeting.

Next Step: Optimize post-webinar CTAs to drive more advisor consultations.

💡 Only 16.4% Have Attended Webinars – Major Growth Opportunity

Webinars are still underutilized compared to video ads & referrals.

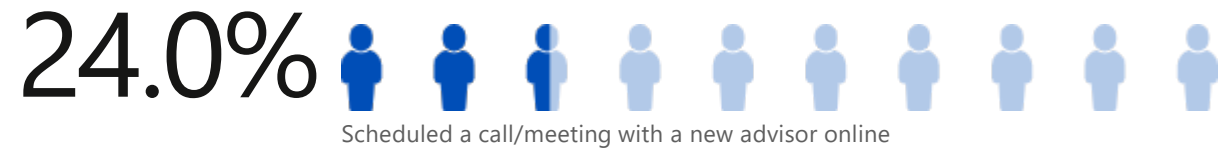
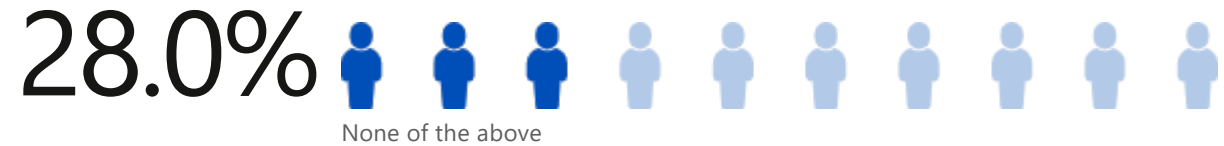
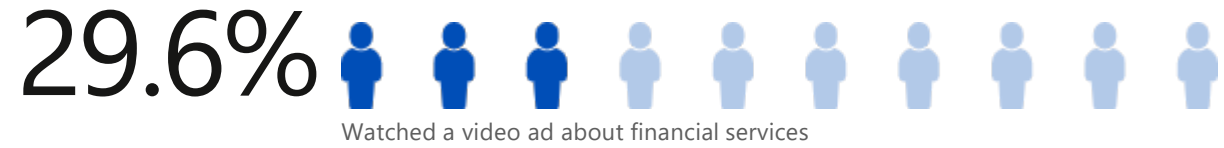
Opportunity: Expand webinar marketing efforts to improve awareness & adoption.

💡 In-Person Seminar Events Are Becoming Less Relevant (Only 5.2%)

In-person seminars are far less preferred than digital alternatives.

Opportunity: Many who would attend in-person would likely attend an online webinar instead.

Next Step: Shift resources from in-person to digital for more scalable engagement.



## Question 4

# What is the most important factor when choosing a financial advisor?

★ Key Takeaways for Financial Advisors & Webinar Strategy

💡 Trust & Reputation (50.4%) Is the #1 Factor by a Huge Margin

Half of respondents prioritize trustworthiness over any other factor.

Opportunity: Webinars can serve as a trust-building tool, establishing credibility before an advisor-client relationship begins.

Next Step: Position webinars as an extension of an advisor's credibility, using real success stories and transparency.

💡 Experience with Retirement Planning (20.0%) Ranks Second1 in 5 respondents value specialized expertise.

Opportunity: Webinar content should emphasize expertise in retirement planning—Social Security, RMDs, tax strategies, and wealth preservation.

Next Step: Advisors should frame themselves as specialists rather than generalists in financial planning.

💡 Fees & Transparency (11.6%) and Personalized Service (12.4%) Are Important But Not the Top Priority

While some respondents care about low fees and accessibility, they pale in comparison to trust and expertise.

Opportunity: Webinars should reinforce transparency but focus more on credibility and retirement expertise.

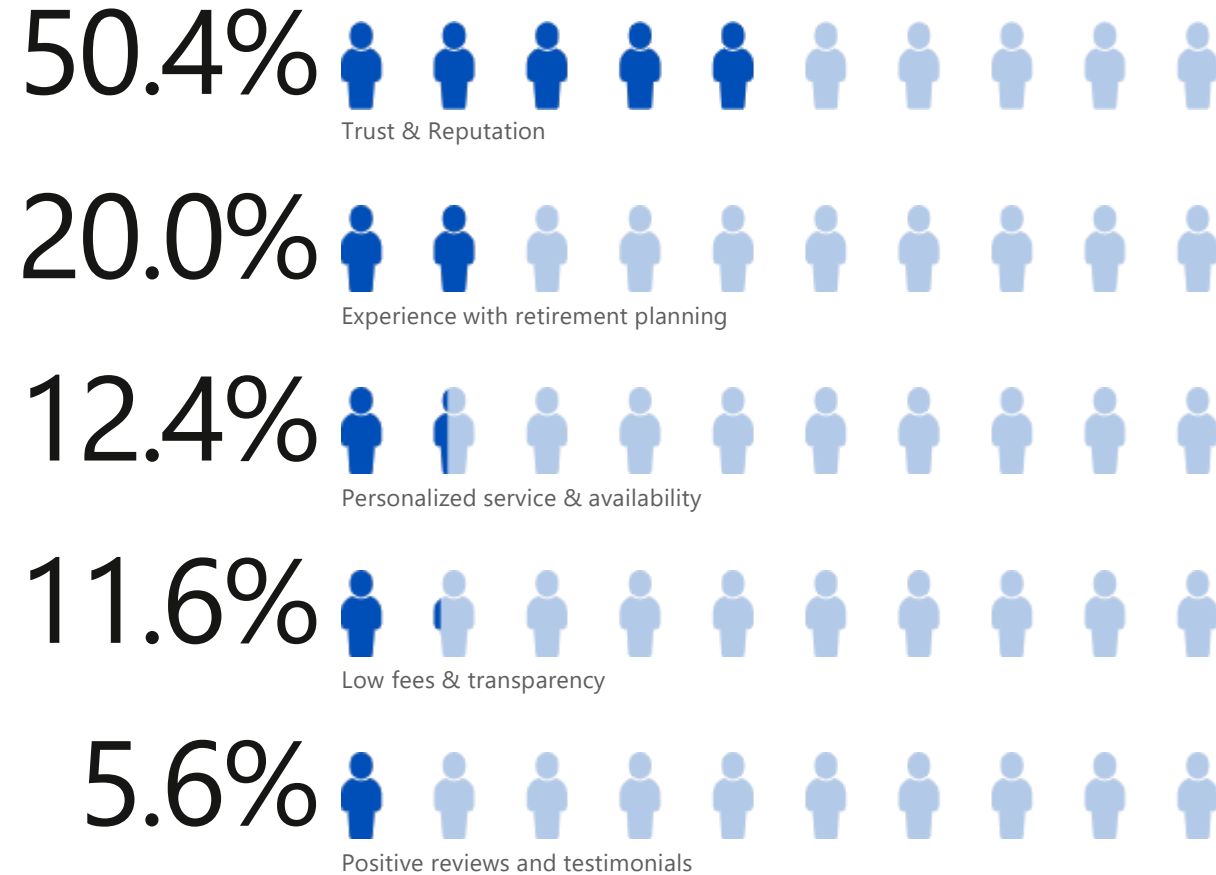
Next Step: Use educational content (rather than price-based selling) to demonstrate trust and expertise.

💡 Positive Reviews & Testimonials (5.6%) Rank Lowest

Only a small percentage value online reviews when selecting an advisor.

Opportunity: This suggests that direct engagement (like webinars & consultations) matters more than online ratings.

Next Step: Focus less on testimonials and more on personal interaction through Q&As and real client case studies.



## Question 5

# Where do you typically research financial advisors?

📌 Key Takeaways for Financial Advisors & Webinar Strategy

💡 Referrals Still Dominate (67.2%)

More than two-thirds of respondents trust referrals over any other method.

Opportunity: Advisors should position webinars as trust-building tools that encourage referrals.

Next Step: Encourage attendees to invite a friend—word-of-mouth is still the best client acquisition channel.

💡 Webinars Are an Underrated Research Tool (14%) Many don't yet consider webinars a way to evaluate advisors.

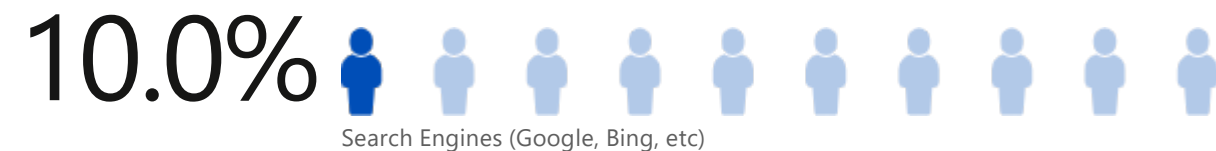
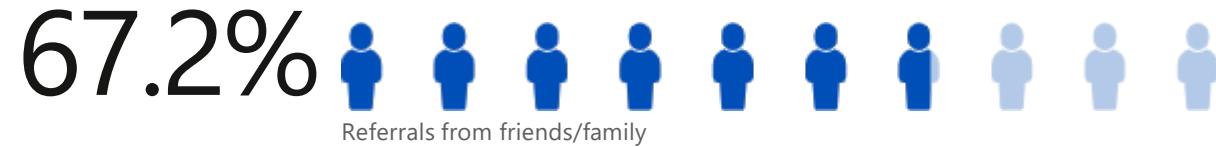
Opportunity: Position webinars as not just an educational tool, but a credibility-building experience.

Next Step: Incorporate testimonials and advisor Q&A into webinars to reinforce credibility.

💡 Online Reviews & Social Media Are More Important Than Search Engines

Online reviews (25.6%) and social media (20.4%) outperform search engines (10%). Opportunity: Having a strong digital presence matters more than ranking #1 on Google.

Next Step: Encourage advisors to maintain an active LinkedIn & Facebook presence and integrate social proof into webinar marketing.



## Question 6

# Have you attended a financial webinar before?

### ✦ Key Takeaways for Financial Advisors & Webinar Strategy

💡 Half of the Audience Has Never Attended a Financial Webinar (49.2%) This presents a massive opportunity to attract first-time webinar attendees.

Opportunity: Many potential clients haven't experienced a financial webinar yet—meaning the right positioning & messaging can drive new participation.

Next Step: Webinar marketing should include "first-time attendee" messaging (e.g., "Never attended a financial webinar before? Here's what to expect.") 💡

50.8% Have Attended Before – They Know What to Expect

Experienced attendees may have pre-existing expectations.

Opportunity: Differentiate webinars from competitors by emphasizing unique value, expert credibility, and interactive elements (Q&A, live case studies, etc.).

Next Step: Segment marketing efforts—use different messaging for first-time attendees vs. those familiar with webinars.

### 📌 What This Means for Webinar Strategy:

✅ A major segment of potential attendees (49.2%) is still untapped.

✅ Messaging needs to address both first-time webinar attendees and returning participants.

✅ Webinar promotions should include "What You'll Learn" and "Why This Isn't Like Other Webinars" messaging.



## Question 7

# What would make you more likely to attend a financial webinar?

### ✦ Key Takeaways for Financial Advisors & Webinar Strategy

💡 Shorter Webinars Are in High Demand (48.0%) Nearly half of respondents prefer 30-45 minute sessions.

Opportunity: Webinars should be concise and to the point—focusing on 1-2 key takeaways instead of lengthy presentations.

Next Step: Test 45-minute vs. 60-minute webinar formats to maximize attendance.

💡 Live Q&A Increases Engagement (35.6%) Over one-third of respondents want the opportunity to ask live questions.

Opportunity: Webinars should always include interactive elements to boost engagement.

Next Step: Dedicate at least 10-15 minutes to live Q&A in all webinar formats.

💡 Expert Branding Can Improve Registration (31.6%) A well-known financial expert increases credibility & attendance.

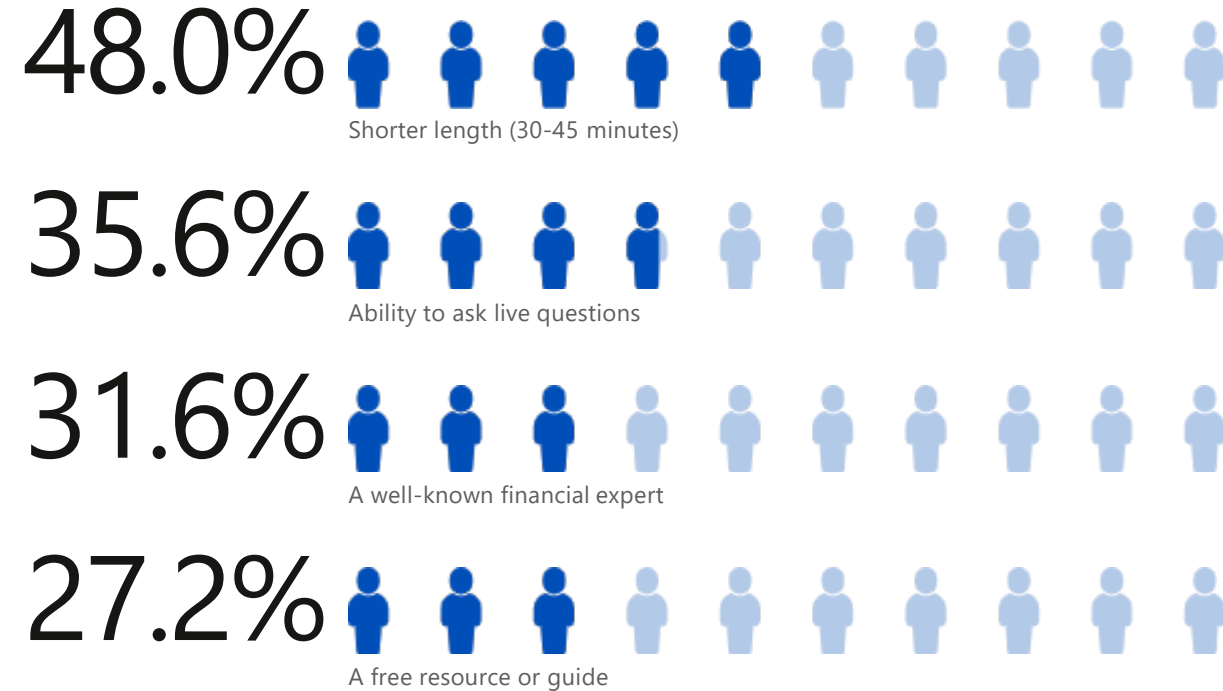
Opportunity: Partner with recognized industry experts or position the host as an authority in financial planning.

Next Step: Highlight advisor credentials & expertise in webinar promotions.

💡 A Free Resource is an Effective Incentive (27.2%) Some attendees need an extra push to register.

Opportunity: Offer a free downloadable guide or checklist to encourage sign-ups.

Next Step: Test different free resources (retirement planning checklists, tax strategy guides, etc.) to see what drives the most registrations.



## Question 8

# Which day of the week would you be most likely to attend a financial webinar?

### ✦ Key Takeaways for Webinar Scheduling

💡 Wednesdays Are the Best Day for Webinars (27.2%) More than 1 in 4 respondents prefer Wednesdays.

Opportunity: Align webinar schedules with this peak preference for higher attendance.

Next Step: Prioritize Wednesday as a primary webinar day.

💡 Saturday Interest is Surprisingly High (17.6%) Saturday is the second most preferred day—indicating demand for weekend webinars.

Opportunity: Test weekend sessions for those who may have limited availability during weekdays.

Next Step: Run A/B tests between Wednesday and Saturday to compare engagement levels.

💡 Fridays & Sundays Are the Worst Days (8.8% & 8.0%) Low interest on these days suggests scheduling webinars on them may lead to lower attendance.

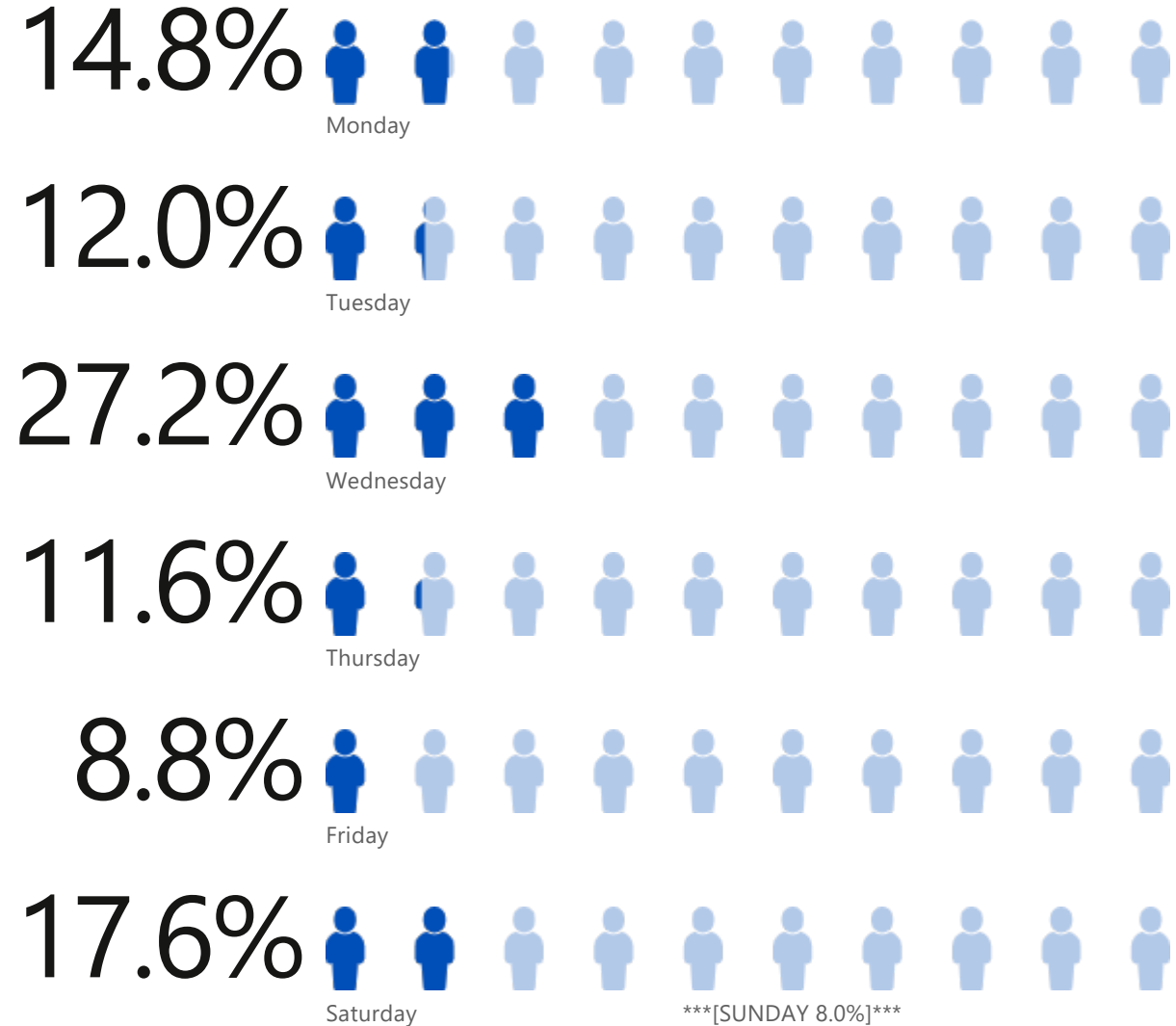
Opportunity: Avoid scheduling events on Fridays and Sundays unless specifically targeting niche audiences.

💡 Weekday Preferences Vary, But Monday is a Strong Alternative (14.8%) Monday outperforms Tuesday and Thursday, making it a viable secondary option.

Opportunity: If running two weekly webinars, prioritize Wednesday + Monday.

### 🚩 What This Means for Webinar Strategy:

- ✅ Wednesdays should be the primary webinar day.
- ✅ Saturdays are an underutilized opportunity—consider weekend options.
- ✅ Avoid Fridays & Sundays whenever possible.



\*\*\*[SUNDAY 8.0%]\*\*\*

## Question 9

# What time of day would work best for you to attend a webinar?

### ✦ Key Takeaways for Webinar Scheduling

💡 **Afternoon Webinars Are the Most Preferred (44.4%)** Nearly half of respondents prefer afternoon sessions.

Opportunity: Scheduling midday to early evening (12:00 PM - 4:00 PM) may optimize attendance.

Next Step: Focus webinar schedules around afternoon time slots.

💡 **Morning Webinars Are Also Highly Preferred (38.8%)** More than 1 in 3 respondents want morning sessions.

Opportunity: Some audiences may prefer to attend a session earlier in the day before distractions set in.

Next Step: Consider A/B testing morning vs. afternoon webinars to measure attendance rates.

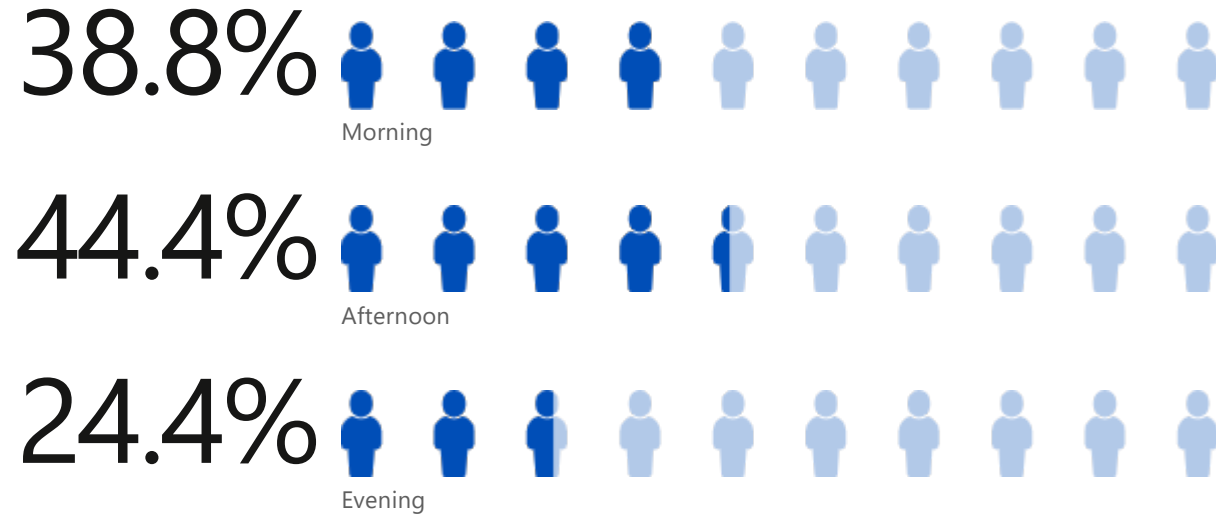
💡 **Evening Webinars Have the Lowest Interest (24.4%)** Evening webinars are the least preferred time slot.

Opportunity: If running evening sessions, ensure they are high-impact and possibly shorter in duration.

Next Step: Use evenings for specific high-demand topics or test shorter webinar formats.

### 🚩 What This Means for Webinar Strategy:

- ✅ Afternoon should be the primary webinar time slot.
- ✅ Morning is a strong alternative for those preferring earlier sessions.
- ✅ Evening webinars should be used selectively based on subject or audience demand.



## Question 10

# Would a financial advisor offering regular educational webinars make you more likely to work with them?

✦ Key Takeaways for Financial Advisors & Webinar Strategy

💡 Webinars Directly Impact Client Trust & Engagement (59.6%)

Nearly 60% of respondents said webinars increase their likelihood of working with an advisor.

Opportunity: Webinars are not just an education tool—they are a business development tool.

Next Step: Position webinars as a credibility-building strategy for advisors—“ Educate first, convert later.”

💡 40.4% Say Webinars Won't Influence Their Decision—But That's Still an Opportunity

Some clients may rely more on referrals, reviews, or personal connections than webinars.

Opportunity: Webinars should be integrated with referral strategies, not used in isolation.

Next Step: Encourage attendees to invite a friend or share their experience—helping bridge the gap between education and referral marketing.

📌 What This Means for Webinar Strategy:

✅ Webinars enhance advisor credibility—advisors who don't offer them may be missing a major trust-building opportunity.

✅ The strongest conversion path may be “Webinar → Free Consultation” to transition educational engagement into direct advisor-client relationships.

✅ Advisors should market their webinars as an essential part of their expertise, not just as an event.





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