



SUMMER 2020 EDITION

# THE TOP 100 PEOPLE IN FINANCE

FEATURING DEEPAK PATEL, FOUNDER & CEO OF ADVISORLEARN.COM



Deepak and Archana Patel are helping financial and insurance advisors to get in front of more prospects and transform their practices using “new age” social media platforms.

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## The Top 100 Magazine

April 17 at 11:50 AM · 🌐

We are thrilled to announce that Mr. Deepak Patel will be featured in the Top 100 People in Finance magazine.

Deepak is the founder and CEO of [AdvisorLearn.com](https://www.advisorlearn.com), a company that was created to "get advisors in front of qualified prospects consistently" so they can help more people achieve their financial goals. The program has two parts: One is the access to an online, on-demand content portal that provides detailed implementation steps; two is multiple support channels with weekly calls, email support, and community support. Advisors get lifetime access to both.

Read more about Deepak and [AdvisorLearn.com](https://www.advisorlearn.com) here:

<https://www.thetop100magazine.com/deepak-patel>

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Deepak Patel



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The Top 100 Magazine Profile for Deepak Patel, Founder & CEO,...



# Featuring Deepak Patel

Founder & CEO of AdvisorLearn.com

Deepak and Archana are Helping Financial & Insurance Advisors to Get in Front of More Prospects & Transform their Practices Using “New Age” Social Media Platforms



## Tell us about AdvisorLearn.com.

AdvisorLearn.com was created to help financial advisors, investment and insurance, solve one big problem that is to “get in front of qualified prospects consistently” so advisors can help more people, and achieve their financial goals. We do that by using social media platforms and modern-day technologies that are very powerful and efficient to reach a large number of high-quality people every single day, and in some cases, fully automated.

## What is the big problem for financial advisors today?

The one big problem every advisor faces is to get in front of ideal qualified and interested prospects and generate consistent appointments. We validated this with over 700 advisor calls from our network of 10,000 advisors. Most advisors rely on “stone age” methods such as cold calling, door knocking, referrals, BNI chapters, networking events, Centre of Influence, seminar, buying leads, etc. These methods have worked, and can work, but are not efficient and do not create the best experience for the end customer.

## What mistakes are financial advisors making today?

There are many mistakes we see advisors make, but let’s talk about the top two. One, most advisors think that posting generic content provided by their company is a social media strategy. It doesn’t work. The second mistake, and a big one, that advisors and advisory firms make is the delusion of “outsource marketing.” They want someone else to do that work so the advisor can just do the meetings. While in theory that makes sense, but it practically fails most of the time.

## How can financial advisors use social media? Isn’t it regulated?

Great question. So there is no denying that the financial industry is very regulated and there are strict compliance rules when it comes to social media.

But that doesn’t mean advisors can’t use social media. The compliance is a gating process, and most advisors are allowed to use “enough” social media to get clients.

## How did you get started with this?

That’s an interesting story. Our background is in the technology industry, where I spent 17 years building and selling complex software to large companies. In addition, we have passion for investments and have our own private investment firm. We started our business to leverage online technology. While we were going through early-stage challenges, our financial advisor mentioned his struggle to find high-net-worth individuals. We created a social media campaign that generated over 100 leads quickly, and one of them had \$6 million in assets. We then validated this problem and solution with many more advisors. Then we just focused and built our platform AdvisorLearn.com.

## Who do you work with?

We work with individuals and firms that focus on investments, insurance, annuity, etc. Our clients range from brand new advisors, insurance agents to large firms with hundreds of millions of managed assets. We are also beginning to speak with some large firms that have thousands of advisors nationally. We are currently helping over 100 advisors and growing each day.

## What results have you seen so far?

Our clients are seeing great results. They have done several meetings with individuals who have \$250,000 to even \$6 million in assets, and few have signed up clients. One advisor signed up her first client with \$1.7 million in AUM, asset under management, and she did over \$3 million total. One generated 312 leads of prospects with a minimum \$2 million investable asset. Multiple advisors signed up investment and insurance clients using our precise methods.



We want to lead the wave of transforming so-called “traditional advisors” to the “new age advisors” by providing them with modern tools and techniques.



#### CONTACT

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 Youtube: /channel/UCmVpFET1QbTCc9nMmCVWKBw?view\_as=subscriber

Our goal is to help advisors make six- and seven-figure incomes and help hundreds of individuals in a few years, not wait a lifetime to reach that level.

#### So, what's the secret; how can financial advisors get clients using social media?

It's not so much of a secret but “art and science” to make all of this work. Social media can be complex, and we have developed a step-by-step process for financial advisors. It starts with creating a foundation on the target market. Then we get laser focused on two methods. First is an outreach method using LinkedIn and Facebook. Second is an inbound method using Facebook Ads to attract ideal clients and automate the whole meeting-booking process. We refer this to the “Nirvana campaign” in our program.

#### How does the program work?

We have developed a unique learning model to help advisors get the optimal environment to succeed. The program has two parts. One is the access to an online on-demand content portal that provides detailed implementation steps. Two is multiple support channels with weekly calls, email support, and community support. Advisors get lifetime access to both.

#### What's your vision, looking into the future?

We are excited about the future for advisors who tap into this big opportunity of using social media and technology. We want to lead the wave of transforming so-called “traditional advisors” to the “new age advisors” by providing them with modern tools and techniques. Our goal is to help advisors make six- and seven-figure incomes and help hundreds of individuals in a few years, not wait a lifetime to reach that level.

#### How can someone learn more about this?

Our website, [AdvisorLearn.com](http://AdvisorLearn.com), is the best platform to learn what we do and how we do it. There is also free training, a book, demo, and several educational blogs.