VELOX MEDIA

MARKETING PLAN · 2025/2026

Meridian Advisory Collective

Recruiting advisers who stay, and helping more families write a will.

PREPARED BY
Velox Media

DATE
June 2025

CAMPAIGNS
Recruitment · Will writing

Singapore · Marketing agency

CONTENTS

What this plan covers

EXECUTIVE SUMMARY

Two problems, one reputation

This brief covers two campaigns for Meridian Advisory Collective, a fictional financial advisory group in Singapore. Both depend on changing how people see the adviser's job. The findings here summarise desk research; the full detail sits in the accompanying research document.

01

Recruitment

Bring more people into financial advisory, and keep them, while addressing the stigma attached to the role.

02

Will writing

Help more young adults and older Singaporeans write a will, so their families are protected after they are gone.

All plans are starting points and will be adjusted monthly based on performance.

HOW THIS PLAN WAS BUILT

Behaviour first, then everything else

Both campaigns follow the same three steps. Each channel and message below traces back to the first two.

01

Identify buyer behaviour

Mid-career professionals browse LinkedIn for a way out of work that feels stalled. Parents in their forties know they need a will and keep putting it off.

02

Find why and where they buy

Career changers want purpose, autonomy and income support during the switch. Will writers want the process to be simple and their families protected.

03

Convert it into how they buy from you

LinkedIn for direct, practical messages; Facebook for stories and awareness; lead forms and a chat assistant to qualify interest before a call.

SWOT ANALYSIS

Meridian Advisory Collective today

Strengths

- A strong record at an international industry awards programme
- Proven founder-led mentorship
- Close university ties and internship programmes
- A broad multi-product platform
- Consistent community and CSR work

S

Weaknesses

- Seen as a "tied agency"
- Dated digital presence

W

Opportunities

- Growing demand for financial advice
- Mid-career professionals looking for a change
- Multi-product capability as a selling point

O

Threats

- Independent advisory firms
- Other agency groups under the same principal insurer
- The "sales-driven" stigma
- Concerns about unpredictable income
- Regulatory complexity

T

01

Recruitment campaign

Find advisers who will build a career, not pass through.

Sarah Tan, 35 · the mid-career professional

Who she is

Works in a demanding corporate role — nursing, project management, marketing, legal or technology. Often holds a master's degree and earns well. Manages a mortgage and plans for her children's education.

What's wrong

Her work lacks purpose, autonomy or room to grow. Singapore's cost of living adds to her worry about her family's long-term security.

What she brings

Strong communication and people skills; analytical thinking; attention to detail; empathy; project management experience; an existing personal and professional network.

Personas are fictional composites built from the research document.

What Sarah needs before she will switch

01
Structure
Training, mentorship and a visible career path.

02
Income safety
Transparent, performance-linked pay, with support during the transition such as hourly pay or a base allowance.

03
Support
Back-office and technology help, so she spends her time with clients.

04
Flexibility
Flexible hours and a collaborative, client-first culture.

05
Government help
Mid-career schemes such as SkillsFuture and training allowances that lower the risk of switching.

Ethan Lim, 23 · the early-career graduate

Who he is

A recent graduate or a few years into his first job. Earning steadily, handling student debt, building an emergency fund and making his first investments. Confident about reaching financial independence early.

What drives him

Strong long-term earning potential, a stable career, continuous learning, and the chance to help others while understanding his own finances better.

What he brings

Comfort with technology; eagerness to learn; analytical ability; adaptability and a fresh perspective.

What Ethan needs before he will join

01
Guidance

Structured training and mentorship.

02
Progression

Clear promotion criteria and a route into leadership.

03
Early income

Pay during licensing, or a base salary, to steady the first months.

04
Leads

Marketing and lead support while he builds a client base.

05
Growth

Support for advanced certifications.

06
Culture

A supportive team that uses technology well.

Change the perception. Keep the people.

Educate the public and potential recruits on the value and ethics of financial advice, and give new advisers a reason to stay the course in an industry known for high attrition.

01

Stay, not just join

Attract people who want a long career, not those who join and leave within months.

02

Break down the stigma

Show the job as it really is, rather than accepting the “pushy salesperson” label.

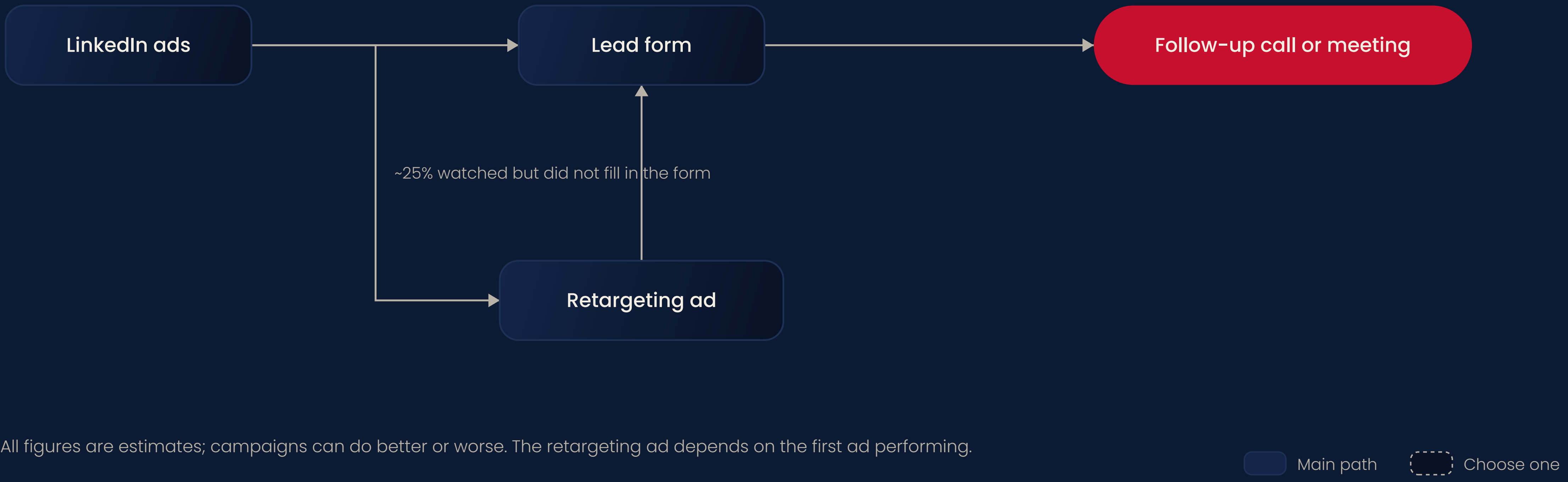
03

Channels

Primary: LinkedIn, where mid-career professionals are. Secondary: Facebook, for broader awareness among younger audiences.

Lead generation on LinkedIn

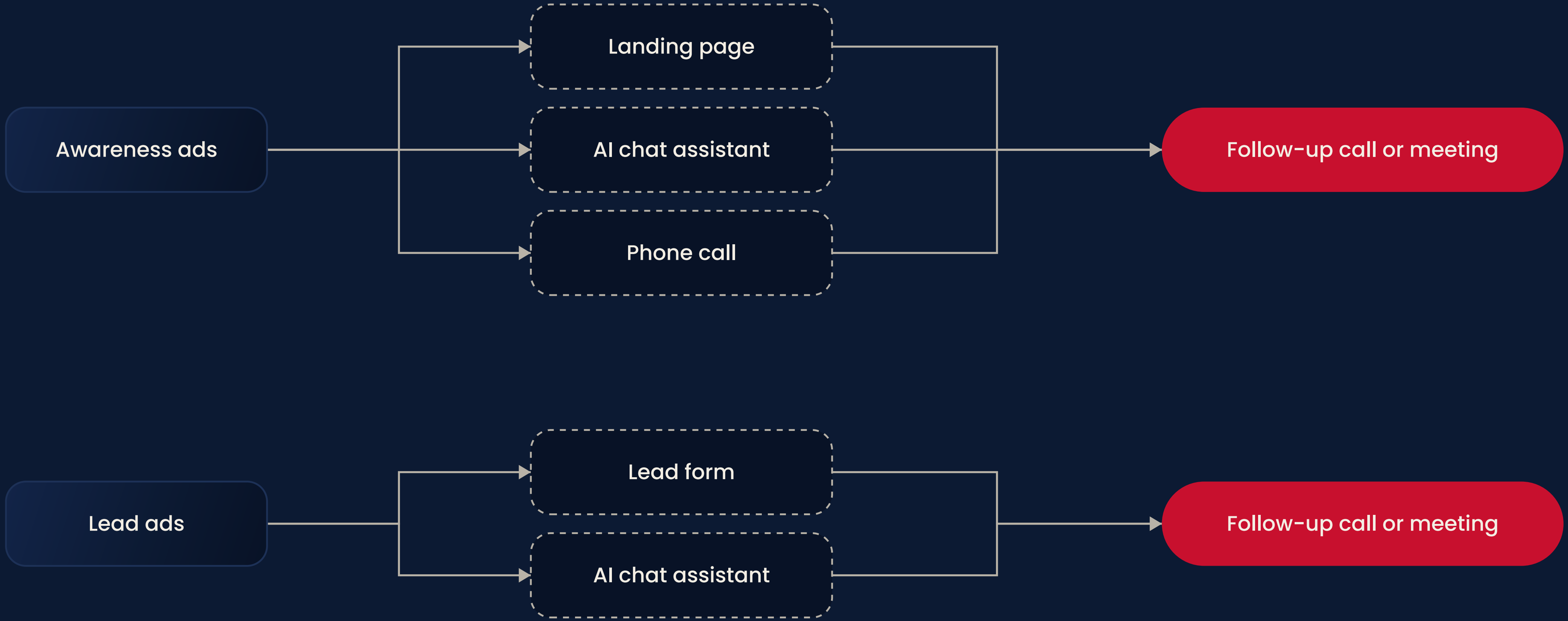
LinkedIn carries most of the recruitment effort. The research shows mid-career changers in their late 30s to mid-40s are the group most likely to stay in the profession.



All figures are estimates; campaigns can do better or worse. The retargeting ad depends on the first ad performing.

RECRUITMENT · FACEBOOK FUNNELS

Awareness and lead generation on Facebook



Each funnel uses one of the dashed options. We test which performs best.

Main path   Choose one

02

Will-writing campaign

Turn awareness into a finished will.

Li Wei, 45 · the sandwich generation

Who he is

Financially established but anxious about the economy. Supports ageing parents and his own children. Has a mortgage and is planning his children's education.

Why he would act

Control over his legacy; protecting his family; peace of mind; avoiding legal disputes and long probate; naming guardians for young children (especially pressing for expatriate parents); and seeing a will as responsible stewardship.

What moves Li Wei, and what stops him

What attracts him

A simpler process. Protection for his children and against family disputes. A will that fits into his wider financial plan. Expert guidance. The reassurance of Singapore's regulated advisory sector.

What stops him

He is one of the roughly 60% of Singaporeans with no plans to write a will in the next 12 months. He knows planning tools exist but hasn't acted. He assumes the process is complicated, and he keeps putting it off.

The 60% figure comes from the survey cited in the research document; confirm the source before using it in ads.

From “I should” to “it’s done”

Raise will completion among 40 to 49-year-olds by making the process simple and showing the protection a will gives their dependants and assets.

01

Start the will

Reach people ready to write their will, and get them started.

02

Break down the stigma

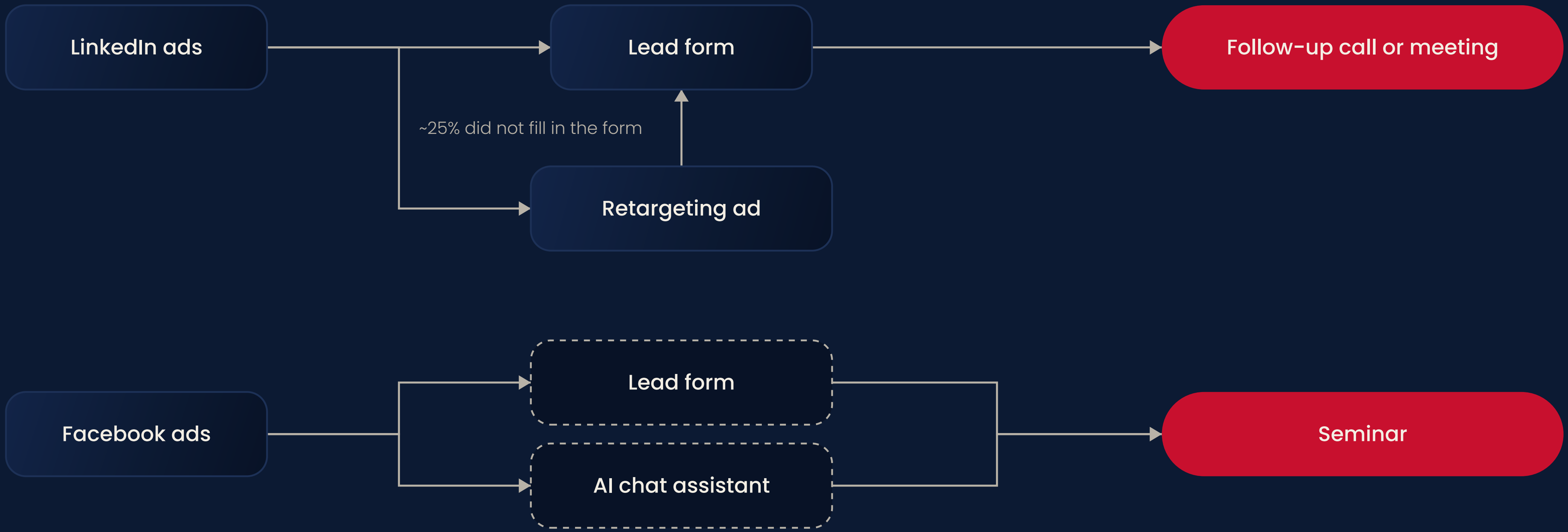
Show the adviser as a guide, not a salesperson.

03

Channels

Primary: LinkedIn for direct, practical messages. Secondary: Facebook for relatable stories and awareness.

LinkedIn and Facebook paths



Facebook leads are invited to a seminar. Figures are estimates.

Main path · Choose one

A free guide in exchange for an email

01

What it is

A short guide with case studies, facts and a plain explanation of how the will-writing process works.

02

Why it works

A pattern we saw in competitor ads. It builds an email list, earns trust before any call, and makes people curious about the firm.

03

How it is used

Offered in LinkedIn and Facebook ads, then followed by a short email sequence that invites a conversation.

03

Content direction

What the ads will say, and how.

CONTENT FORMATS

Video for connection, static for clarity

Each main message is produced as both a video and a static ad, so we can test which format works.

Video ads

Build an emotional connection, show before-and-after stories and the process, and convey personality. Strong on Facebook and Instagram.

Static image ads

Deliver one clear message fast. Best for direct calls to action, a single strong visual or a specific offer. Often cheaper per result.

Competitor patterns

We reviewed common recruitment and will-writing ads from competing teams. Most lean on income, lifestyle or fear. We will test these patterns against our own angles rather than copy them.

Direct on LinkedIn, warmer on Facebook

LinkedIn · Make your work matter

For professionals who feel their work has become routine. Shows how advisers help people reach real security.

LinkedIn · Gain your freedom

For career changers who want control of their time. Pairs earning potential with time for family.

Facebook · You’re not alone

For young professionals worried about building a client base and passing licensing exams. Shows the training and mentorship behind them.

Facebook · A different kind of career

For graduates who want more growth than a typical first job. Presents advisory as modern and technology-led.

Fourteen pieces of content

Expect few direct conversions from this campaign. Its job is to change how the role is seen.

5 · Value content

Shows the group's expertise.

4 · Testimonials

Advisers describe the work itself.

3 · Demonstration

A day in the life.

2 · Offer

Why to join.

Why now, and how simple

LinkedIn · Where will you stop?

Points out the protections people already take for their families, and that about 60% of Singaporeans have no plans to write a will in the next year.

LinkedIn · Settle years of worry in one sitting

Shows how short and straightforward the process is with an adviser.

Facebook · Where will you stop?

The same idea, told as a story rather than a statistic.

Facebook · One last time

A composite story of a will's long-term effect on a family. Clearly labelled as illustrative.

04

Risks and mitigations

What can go wrong, and what we will do about it.

Facebook and Instagram

Ad fatigue

Risk: audiences tire of the same ads, so costs rise and engagement falls.
Response: refresh creative regularly, widen audience segments, vary formats and watch frequency.

Rising ad costs

Risk: competition and algorithm changes push up CPM, CPC and cost per lead.
Response: continuous A/B testing, better landing pages and new placements.

Account restrictions

Risk: policy flags can reject ads or restrict the account, sometimes without a clear reason.
Response: follow Meta's financial services ad policies closely, keep copy compliant, and use the formal appeals process.

LinkedIn

High costs

Risk: clicks and impressions cost far more than on other platforms.
Response: target tightly, keep ads relevant and optimise for lead quality that justifies the cost.

Small audiences

Risk: the reachable audience is limited, so fatigue sets in quickly.
Response: widen targeting carefully, use matched audiences and rotate creative often.

Creative limits

Risk: formats are less visual, which makes ads harder to notice.
Response: strong video and images, clear headlines and new interactive formats.

TIMELINE

Path to launch

01
Discovery
We explore needs and agree expectations. Output: discovery slides.

02
Design
We explore creative directions. Output: prototype files and up to three revision meetings.

03
Development
We work with your team and prepare supporting assets.

04
A/B testing
15% of ad spend tests two or three variations of each ad with a local group, using visitor and website data.

05
Launch
Final ads go live, with ongoing optimisation.

ASSUMPTIONS AND LIMITS

What this plan does not promise

No guaranteed numbers

We do not promise recruits, wills written or lead volumes. We report actual results against the estimates every month.

Regulated advertising

Financial services ads must follow MAS guidelines and platform policies. Your compliance team approves all copy before it runs.

Recruitment takes time

Licensing and onboarding take weeks. Early results will show interest, not new advisers in seat.

Plans are starting points

Changes are made only with your approval, based on the month-one review.

VM

Let's test the plan against your numbers.

A 30-minute call to review recruitment targets and the will-writing offer, and to agree what month one should prove.

Book a Free Strategy Call ↗