aum/hq by Net New

FREE RESOURCE FOR FINANCIAL ADVISORS

The Advisor Growth Toolkit

33 tools in two parts. Part 1 wins new households: ads, funnels, prospecting, CRM, LinkedIn and Instagram. Part 2 runs the practice: planning, meeting notes, compliance and two AI helpers. Pick one per stage, set it up well, and clear it with compliance before it goes live.

2 PARTS | 10 STAGES | 33 TOOLS | CHECKED 2026-11-22

Education only, not legal or compliance advice. Not an endorsement of any vendor. Check each tool against your firm's policies and run anything client-facing past your CCO before it goes live.

PART 1

Win new households

META ADS AND CREATIVE

Build, check and run the ads that bring new households to you.

Meta Ads Manager	**Meta Ads Manager** / FACEBOOK.COM Run lead ads on Facebook and Instagram and track cost per lead.
Meta Ad Library	**Meta Ad Library** / FACEBOOK.COM See every ad other advisors are running, free.
Canva	**Canva** / CANVA.COM Ad images, carousels and posts in your brand colors.
CapCut	**CapCut** / CAPCUT.COM Cut and caption a phone-shot video ad.

FUNNELS, FORMS AND BOOKING

Turn a click into a booked first meeting.

HighLevel	**HighLevel** / GOHIGHLEVEL.COM Funnels, CRM, SMS and email in one place.
Calendly	**Calendly** / CALENDLY.COM Let prospects book a first meeting without the back and forth.
Typeform	**Typeform** / TYPEFORM.COM Short intake forms and quizzes, one question at a time.

PROSPECTING AND SIGNALS

Find households with money in motion before someone else does.

WealthFeed

WealthFeed / WEALTHFEED.COM

Prospect lists and money-in-motion alerts built for advisors, with outreach and follow-up.

Clay

Clay / CLAY.COM

Enrich and score lead lists from many data sources, then send them to your outreach.

CRM AND SPEED TO LEAD

Know who came in, and reach them while they still care.

Wealthbox

Wealthbox / WEALTHBOX.COM

CRM built for advisors, with households and pipelines.

Redtail CRM

Redtail CRM / REDTAILTECHNOLOGY.COM

Advisor CRM with workflows, texting and archiving add-ons.

Salesforce for Advisors

Salesforce for Advisors / SALESFORCE.COM

Agentforce Financial Services: a preconfigured CRM for RIAs.

Zapier

Zapier / ZAPIER.COM

Send every new lead to your CRM and your phone the moment it lands.

LINKEDIN

Be easy to find, and start conversations with the right people.

LinkedIn Sales Navigator	**LinkedIn Sales Navigator** / BUSINESS.LINKEDIN.COM Find and track prospects. Integrates with Smarsh, Global Relay and Theta Lake.
Taplio	**Taplio** / TAPLIO.COM Draft and schedule a month of LinkedIn posts in one sitting.

INSTAGRAM, VIDEO AND ADVISOR MARKETING

Show up where households already spend their time.

Edits by Instagram	**Edits by Instagram** / EDITS.INSTAGRAM.COM Instagram's own editor for captioned reels.
Manychat	**Manychat** / MANYCHAT.COM Send a guide to anyone who comments a keyword.
OpusClip	**OpusClip** / OPUS.PRO Turn one webinar into short captioned clips.
Snappy Kraken	**Snappy Kraken** / SNAPPYKRAKEN.COM Advisor marketing campaigns with approvals and archiving built in.
FMG Suite	**FMG Suite** / FMGSUITE.COM Advisor email, social, websites and compliant texting.

PART 2

Run the practice

PLANNING

Faster analysis, clearer plans, more time in front of clients.

FP Alpha

FP Alpha / FPALPHA.COM

Reads tax returns, wills, trusts and policies, and flags planning opportunities.

Holistiplan

Holistiplan / HOLISTIPLAN.COM

Turns a tax return into a tax report and scenarios you can walk a client through.

RightCapital

RightCapital / RIGHTCAPITAL.COM

Planning software for retirement, tax and insurance, with a client portal and app.

MEETING NOTES

Prep, notes and follow-up without typing through the meeting.

Jump

Jump / JUMP.AI

Meeting prep, notes, follow-ups and CRM updates for advisors.

Zocks

Zocks / ZOCKS.IO

Meeting prep, notes, CRM updates and follow-up emails, without recording the conversation.

FinMate AI

FinMate AI / FINMATE.AI

AI notetaker built for advisors.

COMPLIANCE AND ARCHIVING

Keep the record your firm and the regulators expect.

Smarsh	**Smarsh** / SMARSH.COM Capture and supervise email, text and social for recordkeeping.
Global Relay	**Global Relay** / GLOBALRELAY.COM Archive email, messages and social, with an RIA setup.
Hadrius	**Hadrius** / HADRIUS.COM AI compliance for RIAs: marketing review, communications review and exam prep.
Red Oak	**Red Oak** / REDOAK.COM Route ads and posts through review before they go out.
Theta Lake	**Theta Lake** / THETALAKE.COM Archive and review voice, video and chat, with risk flags on recorded meetings.

AI HELPERS

Two general assistants for drafts and prep. Review everything before it goes out.

ChatGPT	**ChatGPT** / CHATGPT.COM First drafts and outlines. Review before anything goes out.
Claude	**Claude** / CLAUDE.COM Drafting and meeting prep from your documents. Enterprise plan for audit logs.

Tools don't win households.
A system does.

You may already use half of this stack. What usually goes missing is the order: an offer, an ad, a page, a fast call, a follow-up, a record. Net New teaches that system step by step, with a weekly group call and reviews of your work.

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