

# ANATOMY OF THE 2026 WEALTH MANAGEMENT MARKETING ENGINE

## 01. DISCOVERY LAYER (Traffic & Devices)

Mobile vs. Desktop Traffic.  
Mobile dominates initial discovery. **39.5%**

Average Session Duration.  
Excellent form content. **48.6%**

## 02. CONVERSION LAYER (Lead Generation & PPC)

Average Landing Page CVR.  
Top 10% achieve 11.5%. **3.4%**

Average Google Ads CPC.  
High-intent keywords. **\$5.85**

Despite high costs, the high intent of searchers leads to a 40s return on investment when considering long-term advisory fees.

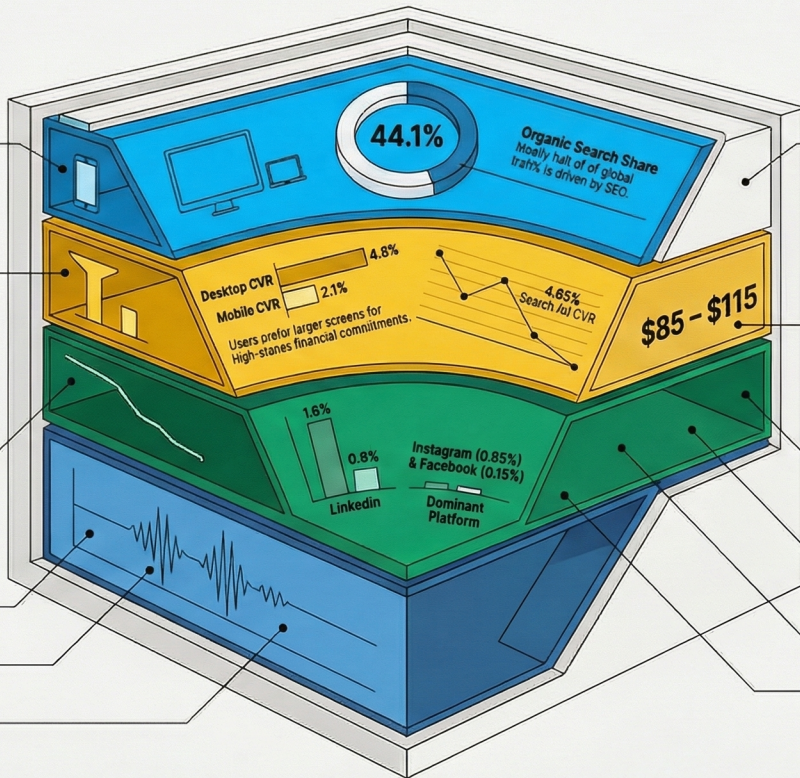
## 03. RELATIONSHIP LAYER (Social & Email)

Engagement Rate.  
Engagement rate.  
Instagram (0.85%) & Facebook (0.15%) **1.6%**  
Dominant Platform

Email Open Rate.  
High value of performance updates. **36.5%**

Click-to-Open Rate (CTOR).  
Highly relevant content. **11.2%**

Unsubscribe Rate.  
Exceptionally low. **0.18%**



## 01. DISCOVERY LAYER (Traffic & Devices)

Mobile vs. Desktop Traffic.  
Mobile dominates initial discovery. **58.2%**

Average Session Duration.  
Users engage deeply with long-form content. **2m 45s**

Average Bounce Rate.  
Excellent for the sector. **48.6%**

Average Google Ads CPC.  
High-intent keywords. **3.4%**

Cost Per Lead.  
Cost per funded account scales to \$450+. **\$85 - \$115**

Trust and authority (E-E-A-T) are the bedrock, as evidenced by organic search driving nearly half of all global traffic.

## 04. FOUNDATION (Retention & Loyalty)

Annual Client Retention.  
Leads financial services sector. **94.5%**

Email Open Rate.  
High value of performance updates. **94.5%**

Average Client Tenure.  
Long-term partnerships. **12-15 YEAR**

Industry Average NPS.  
Exceptionally low. **52**

Clients view advisor communications as essential information rather than promotions.