



## Our Five-year Anniversary

By Robert Huebscher

June 5, 2012

Last month marked the five-year anniversary of our publication. I would like to share some of our accomplishments from the past year and our goals for the next.

The distribution of our flagship newsletter, *Advisor Perspectives*, has grown to over 250,000 people, virtually all of whom are financial advisors. Our web site attracts nearly 150,000 unique visitors each month, which is triple what it drew a year ago and which surpasses the traffic at all other sites that cater exclusively to financial advisors (according to the independent research firm [Quantcast](#)). The readerships of *Research Perspectives* and of our weekly and monthly digests have grown significantly as well.

Our prominence is attributable, in large part, to the exceptional quality of contributed articles we receive. In the last year, Larry Siegel, Wade Pfau, Joe Tomlinson and Dick Vodra have become regular columnists. Their work, that of our other authors (such as Michael Edesess and Geoff Considine), and the guest contributions we regularly receive – all distinguish us as a source of thought leadership among financial advisors.

The major new addition to our web site over the last year was Doug Short's commentaries. We acquired Doug's firm in the spring of last year and fully integrated his content by mid-summer. Doug provides real-time insights into the latest economic and market data, along with analysis of longer-term issues targeted to advisors and professionals in the investment industry. Doug has also become a prominent speaker at industry events and is often quoted in the media.

We've added a number of other features to our site. We are becoming a central hub for video of market and economic commentaries from fund companies, and new content is being added to our video section every week. We added a job posting section to our site, as a free (for now) service to those in the industry who are looking to increase their staff or to find new positions.

We've also added some small features that you may not have noticed. For example, there is now a "remind me later" icon on all articles and commentaries. If you don't have time to read something when you first see it, this will send you an email reminder to read it at a date and time you specify.

Our goals for the next year are equally, if not more so, ambitious. For our newsletters, that means continuing to provide thoughtful articles that address the issues that are most important to financial advisors, with practical and actionable insights. We have always aimed to improve the quality of our analysis and writing with each issue we publish, and that goal will not change.



A new focus for us will be on the topic of energy. Energy prices and resource constraints will be an increasing source of volatility in the markets and the economy. Our goal is to educate our readers on the key issues that underlie the long-term trends in the energy sector and to understand how that will affect client portfolios and advisory practices. This topic does not receive the attention it deserves in other publications, and we intend to fill that gap. One such article, by Dick Vodra, appears in today's issue.

There will be new initiatives to look out for as well. Most notably, we are developing a new platform that will facilitate advisor-to-advisor communication about investment-related and other topics. We know that advisors regularly meet in informal "study groups" to discuss issues such as portfolio construction, fund selection and practice management needs. Those advisors who participate in study groups benefit greatly, and our goal is to provide those benefits to all advisors. This will be an entirely new service – a major software development effort for us. You'll hear more about this later this year. We're very excited about the potential this holds for our readers.

Our mission is to enable advisors to make better decisions that improve the outcomes for their clients. Each week we look back to see what we could have done better, in order to ensure that we are doing everything possible to fulfill that mission.

Lastly, this publication would not be possible without the support of our advertisers. We are proud to count among them many of the largest and most prestigious firms that support financial advisors and their clients. We look forward to serving them, as we do you, over the coming year.

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