

YouTube Strategy Playbook for Financial Advisors

Find the questions clients ask in a first meeting, copy the can-I-retire title pattern, plan 30 days. Fill the bracketed prompts.

1. Your client on one page

Fill this before anything else. Every other section refers back to it. Send every script through compliance before you film.

Who your clients are

[e.g. couples aged 55 to 65 with \$1 million to \$3 million saved]

Their typical age and savings

[e.g. 60, \$1.5 million, wants to spend \$9,000 a month]

The five questions clients ask in a first meeting

[e.g. can we retire next year, when should we claim Social Security]

Your weekly format

[can I retire case study, savings by age, or when-not-to video]

Current channel average views (last 20 videos)

[number; the baseline every result is measured against]

The one booking link in every description

[introductory call page]

2. Why financial advisors stop growing

- Market commentary: out of date in a week, and large channels already cover it.
- Titles with no age and no number: viewers click when the title matches their own situation.
- Repeating the standard advice: show who the standard advice does not fit.

3. The five steps

1. Find the questions clients ask in a first meeting

List the questions new clients ask you most. Search each in OutlierKit Outliers with an age or a number. Keep videos above 5x their channel average, check that an advisor or a firm runs the channel, and write down the words in every winning title.

2. Pick the format you can film between client meetings

Can I retire case study, savings by age, or when-not-to video. Filter the outliers to channels near your size; the format that repeats three times is your weekly video.

3. Copy the hook: an age, a savings figure, can I retire

State an age and a savings figure and ask the question the viewer is asking. Use the age and the savings of your typical client. Read the comments on the top three videos and note the situations viewers describe.

4. Fill 30 days

One case study and one decision video a week, one slot held open for the question you heard most that week. Send each script through compliance before you film.

5. Measure views against your average and log enquiries

After seven days, compare each video to your channel average and repeat any format above 2x. Ask every enquiry which video they watched and log it next to the views.

4. Title patterns to copy

Verified pattern, pulled from OutlierKit on 8 October 2026: [age] with \$[savings], can I retire? Three advisor channels with under 3,000 subscribers got more than 13x their normal views from it.

- Can you retire at [age] with \$[amount]?
- I am [age] with \$[amount]. Can I retire now and spend \$[amount] a month?
- Are you on track? Average retirement savings by 55, 60 and 65
- Why smart retirees claim Social Security at 62, not 70
- Stop converting: when not to convert to Roth in retirement
- What to do with your 401(k) when you retire

[illegible]

5. 30-Day Calendar for Financial Advisors

One case study and one decision video a week, one open slot. Fill the Views and Enquiries columns; they decide next month's topics.

[illegible]

Appendix: prompt pack for Claude with the OutlierKit connector

Paste each prompt into Claude with the OutlierKit connector switched on (Pro or Max plan). Replace everything in square brackets.

Question scan

I am a financial advisor and my clients are [who]. Use OutlierKit to find videos by advisors that beat their channel average by 5x or more on channels under 100,000 subscribers. List the top 10 with channel size and multiplier, and tell me which words repeat in the titles.

Tools Claude calls: outliers_search. Cost: about 2 credits.

Viewer situations from comments

Pull the comments on these 3 videos: [URLs]. List the 10 situations viewers describe (age, savings, the decision they face), in their own words, and turn each into a case study title.

Tools Claude calls: videos_comments. Cost: about 6 credits.

Format check at my size

Find 10 financial advisor channels similar to [channel URL] with between [half my size] and [three times my size] subscribers. For each, list the top 3 outliers from the last 6 months and say whether each is a can I retire case study, a savings by age video or a when-not-to video. Which format repeats most at my size?

Tools Claude calls: channels_similar, channels_videos. Cost: about 55 credits.

Thirty-day plan

Using the outlier list above, write 4 can I retire case study titles and 3 decision video titles for [client profile], each with the one-line hook for the first 15 seconds.

Tools Claude calls: outliers_search. Cost: about 2 credits.

Confirm the search demand

For each of these 7 titles: [titles], give me the main search phrase and check it has YouTube search demand. Flag any title where the phrase has none and suggest a closer one.

Tools Claude calls: keywords_research. Cost: about 2 credits.