

SEC-Compliant Video Testimonials & Advisor Storytelling

Emmy Award-Winning Video Production
for Financial Advisors, RIAs, & Wealth Management Firms

About Collin Kushner

As an Emmy Award-winning journalist and video producer, I help financial advisors bring their stories to life through authentic, SEC-compliant video. Whether it's client testimonials, advisor introductions, or creative firm spotlights, my work is designed to build trust and showcase what makes your practice unique. Winning an Emmy was an honor, but the real reward is helping people open up and tell their stories in a way that connects. By combining professional production with compliance-first messaging, I create videos that highlight your strengths, demonstrate client satisfaction, and inspire confidence from the very first impression.

Why Use Testimonials?

- **Build Trust & Credibility:** Authentic video testimonials demonstrate real client satisfaction.
- **Differentiate Yourself:** Stand out by showing real stories, not just performance numbers.
- **Connect Emotionally:** Video captures warmth, trust, and authenticity that written review can't.
- **Grow Your Business:** Showing genuine client relationships makes prospects more likely to choose you.
- **100% Compliant:** Produced with full SEC compliance so you can market with confidence.

The SEC Marketing Rule: What You Need to Know

- **New Opportunity:** Since November 2022, testimonials and endorsements are permitted with conditions.
- **Compliance Essentials:** Disclose client status and compensation, adviser oversight, & disqualify "bad actors."
- **Legal Basis:** SEC Rule 206(4)-1, SEC Press Release 2020-334, Advisers Act Sections 206(1) & 206(2).
- **Note:** Advisors are responsible for ensuring compliance with SEC regulations and firm-level policies. Testimonial content should be reviewed by your CCO or legal team before use.

Compliant Video Production

- **Plan:** Together, we select clients and craft the right story.
- **Interview:** I make clients feel comfortable so they share their genuine experiences.
- **Produce:** High-quality filming, editing, and compliance integration.
- **Deliver:** Polished videos optimized for your website, social media channels, and marketing emails.
- **Support:** Ongoing guidance to ensure continued compliance and maximum impact.

Why Professional Video Services?

- **Emmy Award-Winning Storytelling:** Proven ability to capture authentic client experiences.
- **Compliance First:** Every video is created with SEC rules in mind.
- **Professional Video Production:** From lighting to video editing, your videos will look sharp and trustworthy.
- **Produce:** High-quality filming, editing, and compliance integration.
- **Effortless for Advisors:** Everything is managed for you, so you can focus on what matters most.

Ready to Build Trust?

Let's tell your story: compliant, compelling, and built for trust.
Reach out to explore testimonial or advisor introduction videos
that connect with prospects from the first impression.

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