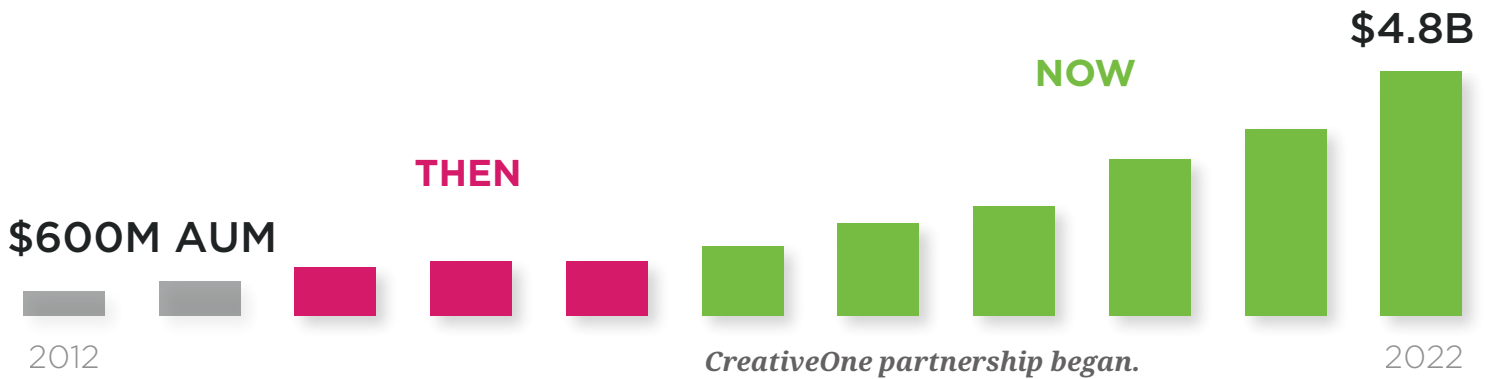


# Grow past plateaus.

What's the impact of adding risk management and growth-oriented marketing in an RIA?



## *The Firm's Challenge*

Couldn't break three-year plateau.  
AUM growth was stagnant, margins were shrinking.  
Revenue flat.

## *About the Firm*

Southeast Independent RIA.  
Minimal insurance.  
Non-growth-oriented marketing team.  
Knew "the right companies to work with," but couldn't get to their employees due to corporate red tape.

## *Uptick in Revenue*

Year 1  
**\$1.92M**  
Revenue

## *Uptick in Advisory*

**+181%**  
Impact of working with us for *three years*.  
**\$1.1B AUM to \$4.8B**  
+\$3.7B in *seven years*.

## *Secret Ingredients*

**Training and educating** the advisor team.  
**Powerful** relationship marketing.  
**Optimized** marketing tech stack.

# A five-year growth plan.

begins with identifying target markets and building a strategic analysis.



**Omni-Channel  
Marketing Strategies.**



**14 Metropolitan  
Areas.**



**27 Lead  
Generation Campaigns.**

## *Marketing Execution*

- **Corporate branding** (YUM Center executive suite).
- **Pitch to approach bank** (Expansion Offering).
- **Lead generation sales scripts** for receptionists and advisors.
- **Physician specialist omni-channel** lead gen campaign.
- **J&J** lead gen campaign.
- **Trained marketing team** (digital best practices).
- **Kroger** lead gen campaign.
- **Lilly early retirement** lead gen campaign (multi-city).
- **GE executive RIF** campaign (multi-city).
- **GE aviation RIF** lead gen campaign.
- **GE transportation buyout** lead gen campaign.
- **Recruitment videos.**
- **Fortune 500 partnership** (benefit training videos).
- **New market development planning.**
- **Unicorn List** (company lead gen targets).

## *Prospects with quality over quantity.*

- VP, Tax Director & Tax Counsel
- Sr. Managing Director
- Global Tax Advisor
- Finance Executive
- Jet Engine Engineer
- Manager of Global Patent Safety
- Human Resources Executive

**Acquired 4 new clients  
with over \$8M AUM each.**

**\$2.6M**

impressions

**32,435**

landing page visits

**1,000+**

highly qualified leads

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