

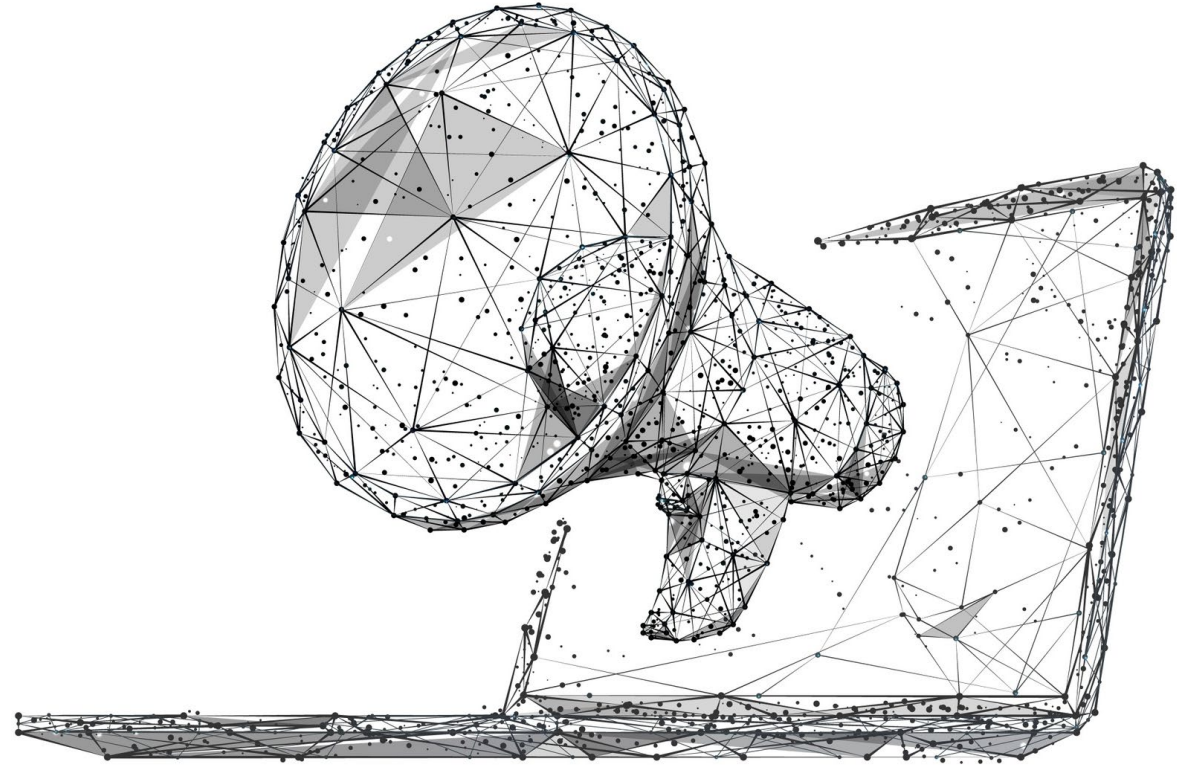


OVERVIEW

# EDGE CREATIVE GROWTH

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Marketing Strategies for Wealth Management Firms



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- 2 | EXPERTISE
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ABOUT US



THINK OF US AS YOUR **OUTSOURCED CMO**

## WHO WE ARE

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We are a full-service marketing agency specializing in RIA growth strategies, operating within Edge Partners™.

ABOUT EDGE PARTNERS™

## RIA GROWTH

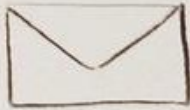
Our team brings together subject matter expertise in practice acquisition, deal structure and execution, institutional asset management development, and growth strategy management.



# Workflow Strategy

abandons cart

1 hr. delay



left cart

1 day delay



No purchase



1 day delay

ad  
pro

## WHAT WE DO

We create marketing strategies that align with your business goals and **drive action** throughout the entire sales process.





## OUR IDEAL PARTNER

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An independent RIA seeking to differentiate itself from competitors with a custom marketing strategy focused on growth.

# OUR FOCUS

Introduce qualified leads to your firm and engage them at all stages of the conversion funnel.





EXPERTISE



# EXPERTISE

We creatively and efficiently apply our RIA organic and inorganic growth knowledge to our marketing strategies.

## ACCOUNT BASED MARKETING (ABM)

Works best for nurturing ultra-high-net-worth individuals.

## DIGITAL CONTENT STRATEGY

Marketing & sales funnel building and alignment.

## EXPERIENTIAL MARKETING

Events foster stronger relationships.

## BRAND DEVELOPMENT

Improve messaging, look, and feel.

## M&A + TRANSITION MARKETING

Attract, engage, and onboard your new partner.

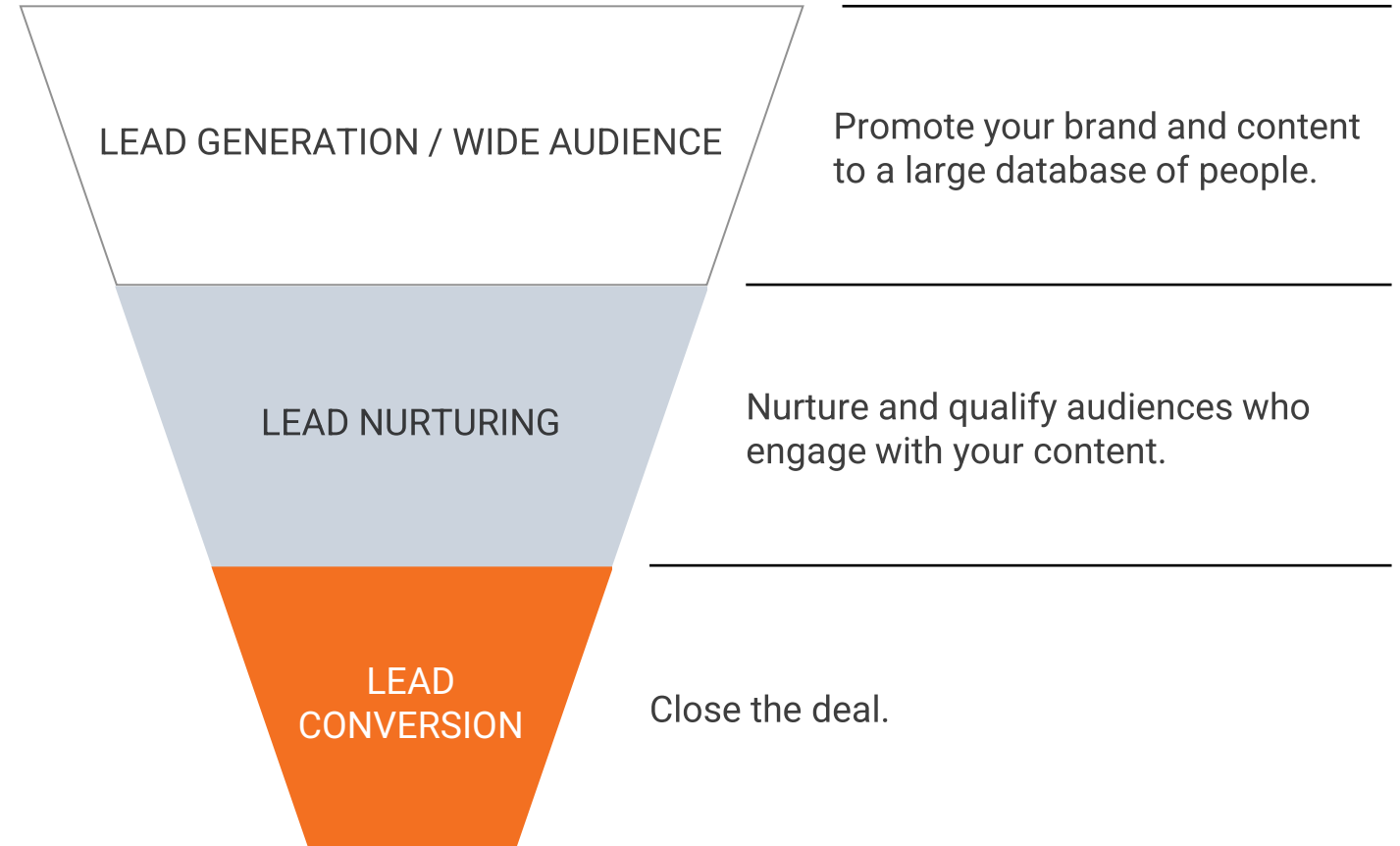
# ACCOUNT BASED MARKETING (ABM)





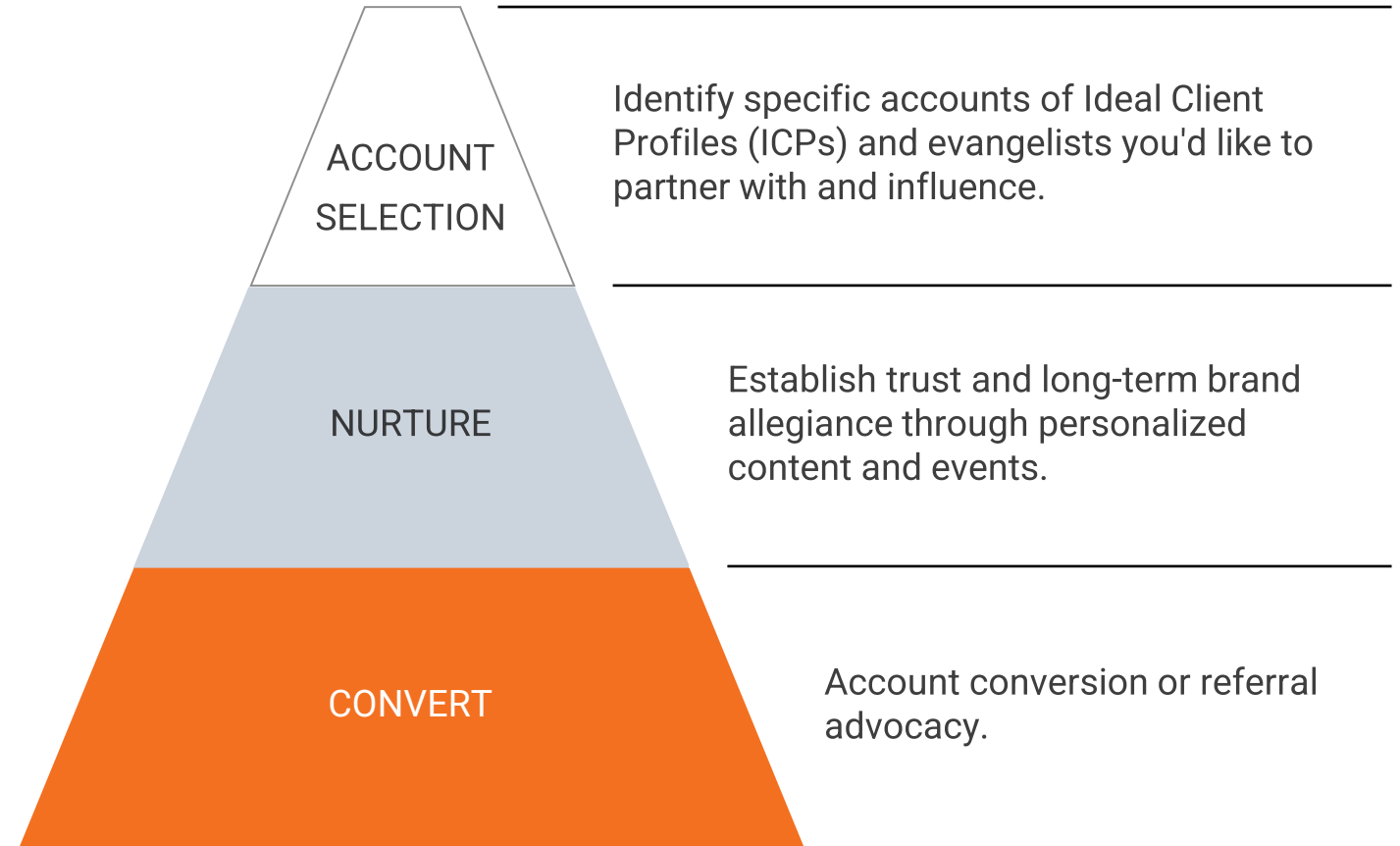
ABM IS *NOT* INBOUND MARKETING

# INBOUND IS LIKE FINISHING WITH A NET



SO, WHAT IS ABM?

# ABM IT'S LIKE FISHING WITH A SPEAR





# DIGITAL CONTENT STRATEGY

It's not just the content itself, but rather delivering the **right content** to the **right person** in the **right place** and at the right **time**, for the purpose of meeting your **business goals**.





# WE DESIGN AND DEPLOY TAILORED, ACTION-DRIVEN FUNNELS



## CONTENT IS KING

Never wonder what to send.  
We create the perfect balance of evergreen, thought leadership, and timely content.



## CONSISTENCY IS KEY

Multichannel: Email, social media, display ads, print, broadcasting, and in-person marketing.



## PERSISTENCE IS A MUST

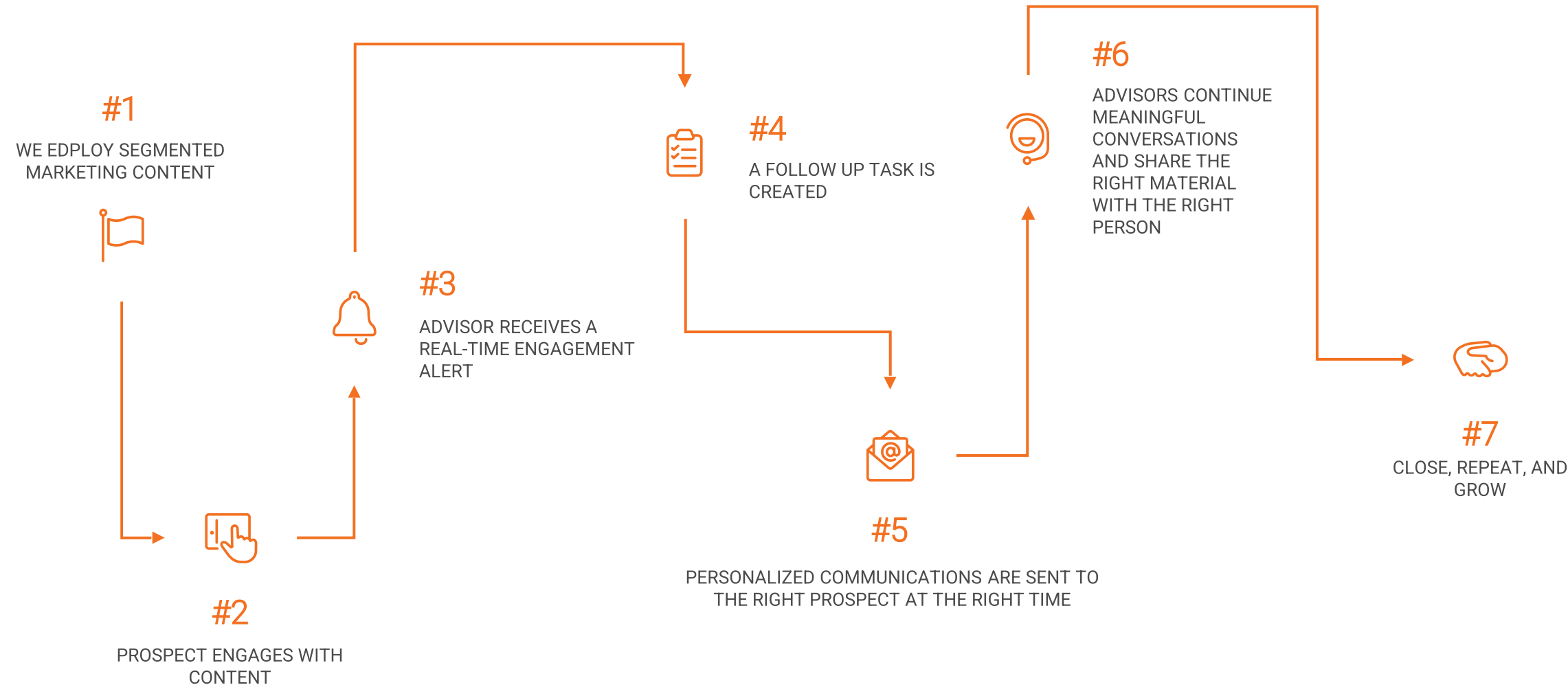
Once they're in your funnel, the nurturing will continue. When they're ready, you'll be top of mind.



## PERSONALIZED

Make sure your prospects always feel special with automated messages that feel authentic and personal.

# ACTION-DRIVEN FUNNEL



## UNDERSTAND YOUR AUDIENCE

RIAs audience personas are usually divided into two groups: Ideal Clients Profile (ICP) and Evangelists.



### IDEAL CLIENT PROFILES (ICP)

Individuals with high net worth who have undergone a major life event such as a divorce or business succession, or who have other complex financial needs that require specialized attention.



### EVANGELISTS

Identify COIs who may refer or have existing relationships with your ICPs and potential partners.

## DIGITAL CONTENT STRATEGY (CONT.)

# DISTRIBUTION CHANNELS

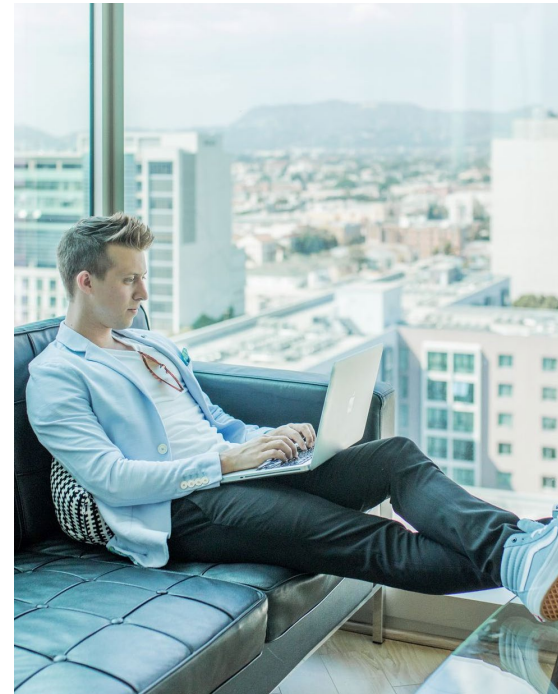
Your brand voice should be one, but your message should be tailored to each channel and audience.



WEB PRESENCE



PAID & ORGANIC SOCIAL MEDIA



EMAIL OUTREACH



PRINT MATERIALS



# EXPERIENCES

Connect with your prospects, clients, and COIs on a deeper level.



## EXPERIENTIAL MARKETING

# WHEN DONE RIGHT

Third-party research shows higher ROI than traditional marketing, especially for high-profile clients and high-ticket services.

### FOSTER RELATIONSHIPS

The trust and loyalty developed can elevate relationships beyond the transactional, so brands are not seen as “service providers” but as “strategic partners”.

### DEVELOP ADVOCATES

Memorable experiences get people talking & sharing with their peers, so they can do your selling for you, in a more authentic way.

### CREATE A TWO-WAY CONVERSATION

Speak directly to your most valuable client and hear real-time feedback, concerns, hopes and dreams.

### ENGAGE THAT UNREACHABLE PROSPECT

A unique offering can entice hard-to-reach executives who have many options and receive a lot of solicitations.



# BRAND DEVELOPMENT

A brand is not built in one day. A brand is who you are, what you look like, what you say, your tone, your culture, your values, and your legacy.





## BRAND DEVELOPMENT

# 3 KEY GOALS IN MIND



### BRAND AWARENESS / LEAD GEN

Creating bold and distinctive content can capture the interest of your audience across various channels. Moreover, presenting compelling offers can help you obtain more email subscribers.



### BRAND REPUTATION / LEAD NURTURING

Turn subscribers and COIs into warm leads and influencers with educational nurturing sequences that build credibility.



### BRAND EFFICACY / ACTION-DRIVEN

It's not enough to just get noticed. You need purposeful outreach and action-driven content that encourages dialogue and meeting requests.



## BRAND AWARENESS

# HOW UNIQUE IS YOUR BRAND?

To generate awareness, a brand needs a clear identity with a head-turning look.

- **HEAD-TURNING LOOK**

- Put a fresh coat of paint on your visual identity.
- Attract strategic partnerships with a sleek look and feel.
- Stay away from stock and canned content.

- **AUDIENCE-DRIVEN MESSAGING**

- Understand who your buying personas are and where they spend their time.
- Appeal to the luxury market audience with high-end imagery and copy.
- Intrigue that elusive millennial investor with creative content.

## CREDIBILITY & LEADERSHIP BUILDING

Now that your audience knows who you are, it's time they connect with your brand through trust-building content & experiences.

- **ENGAGING THOUGHT-LEADERSHIP CONTENT**

- Instill trust.
- Gain industry respect with insightful content.
- Don't let your content get stale.

- **EXPERIENTIAL MARKETING**

- Brand partnerships and event integrations are memorable.
- In-person connections matter, especially with influencers and potential brand evangelists.

## ACTION-DRIVEN CONTENT

Empower prospects and evangelists to take action. Whether that is booking the consultation, reviewing your investment insights, or taking the next steps toward long-term partnerships.

- **TIMELY**

Address concerns as they arise and show your leads and clients that you've got their backs.

- **TRANSACTIONAL**

Clear, concise, and action-driven to secure relationships.





# M&A MARKETING



# ACQUISITION & TRANSITION COMMUNICATIONS

Attracting and onboarding your new partner along with their client-wallet requires a well-orchestrated transition package.



## ATTRACT THE RIGHT PARTNER

How desirable of a strategic partner are you? We help you look the part by clearly communicating your appeal and strengths.



## ONBOARDING COMMUNICATIONS

Reassure pre- and post-transition confidence with your partners, clients, and employees.



## INSTILL BRAND ALLEGIANCE

A solid communication strategy helps you start off on the right foot and build brand loyalty from within.

CAPABILITIES

## CAPABILITIES

# WE CREATE, IMPLEMENT, MANAGE & OVERSEE

### BRAND DEVELOPMENT

- We conceptualize, develop, and apply your brand across all channels.

### SHORT & LONG-FORM CONTENT

- Copyrighting and creative design.
- Print, digital, and advertising.

### DIGITAL MARKETING STRATEGY

- Content strategy (funnel architecture), implementation and execution.
- Project management and oversight.

### ABM STRATEGY

- Content strategy, implementation, and execution.
- Project management, oversight, and reporting.

### EXPERIENTIAL MARKETING

- Integrated branded events conceptualization.
- Full event production and execution.

### AUDIOVISUAL CONTENT

- Conceptualization, production, and distribution.



# SERVICES & PRICING

# PRICING OVERVIEW

Personalized, white-glove attention included with every package.



## OCMO BLUEPRINT: \$30,000/90 DAYS

We consult, audit, assess, advise, and deliver a 12-month growth marketing plan with KPIs + budget, ready for execution.



## CORE AWARENESS: \$3,000/MONTH

One outbound Thought Leadership Campaign (TLC) to raise awareness of your firm and enhance your intellectual capital.



## LEAD MAGNETS: \$3,500+/MONTH

Boost growth by engaging niche audiences with targeted campaigns like **Inbound Paid Lead Generation, Referral Campaigns, Master Classes, and Client Appreciation Events.**



## BRAND LIFT: \$36,000/90 DAYS

New brand identity, compelling narrative, new website, smart content creation + application.



## CORE ENGAGEMENT: \$5,000/MONTH

Two outbound TLC + Advisor or offering-specific campaign to strengthen your brand presence among leads, clients, and COI, ensuring you remain top-of-mind.



## SALES PIPELINE: \$CUSTOM

We build an automated Sales Pipeline in your CRM and integrate it with your marketing funnel.



## TECH SET UP: \$3,000-5,000/90 DAYS

We seamlessly integrate your CRM with your website, social media, ads, emails, and events, allowing you to track marketing ROI from a single dashboard.



## CORE GROWTH: \$7,500/MONTH

Three outbound campaigns designed to raise awareness, attract new leads, engage and convert.

# WHY **EDGE** CMO?

Our marketing approach is growth-focused.

- **STRATEGIC OVERSIGHT**

We don't just send you a quarterly report. We actively engage with your advisors, helping them leverage marketing to increase their AUM.

- **CURRENT**

Tactics change with audience behavior, which changes every 6 months. Our tactics are driven by current data and today's landscape.

- **FULL-SERVICE**

We handle EVERYTHING. Print, digital, audiovisual, funnel design, project management and reporting.

- **THOUGHTFULLY CUSTOMIZED**

We are not an automated service with canned content. We create effective and thoughtful conversion paths tailored to your audience.







YOU'VE HEARD FROM US

WE WANT TO HEAR  
FROM YOU.



[Call Us](#)



[Email Us](#)



[Visit Our Website](#)



[Connect on LinkedIn](#)

**[BOOK A FOLLOW UP CALL](#)**

THANK YOU