FINANCE CASE STUDY

Wealth Management Firm: **400+ Leads in One Year**

A full-funnel strategy that reached affluent households and turned them into consultations.

OVERVIEW

Client
Wealth management company

Campaign length
One year

Geography
Affluent metro areas across the Midwest

Monthly investment
$15,000

Products used
Search (SEM), Streaming TV, Display, Local SEO, and Organic SEO

OBJECTIVE

Raise brand visibility, drive qualified website traffic, and increase consultations.

400+
total leads over one year.

STRATEGY AND SOLUTIONS

The client wanted to attract **high-net-worth individuals** actively looking for financial planning, retirement solutions, and investment guidance.

We built a **full-funnel strategy**: Search to capture high-intent searches, Streaming TV and Display to build trust with affluent households, and Local and Organic SEO to grow visibility in target markets.

By layering in **audience targeting** based on income, financial behavior, and intent signals, we kept messaging consistent across every channel, so each tactic worked together to attract and convert qualified prospects.



RESULTS

30+
leads a month

400+
total leads

13K+
total conversions*

5+
quality opportunities a month

- ***Conversions** include service page visits, completed contact forms, and other key actions aligned with the client's goals.

Looking for more qualified clients? We'll build a full-funnel plan that reaches them at every stage.

Results from a single advertiser; individual results vary.