

OVERVIEW

Client

Wealth management company

Campaign Length

One year

Geography

Affluent rural communities across the Midwest

Monthly Investment

\$15,000

Objectives

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

Products Used

Search Engine Marketing (SEM), Streaming TV, Display, Local SEO, and Organic SEO

RESULTS

30+

Leads a month

400+

Total leads

13k+

Total conversions (*service page visits, completed contact forms, and other key on-site actions aligned with the client's goals.*)

5+

Quality opportunities/month

STRATEGY AND SOLUTIONS

- The client aimed to attract high-net-worth individuals actively seeking financial planning, retirement solutions, and investment guidance.
- To reach and convert a high-value audience, we implemented a multi-funnel digital strategy combining SEM to capture high-intent search traffic, Streaming TV and Display ads to build brand trust with affluent households, and both Local and Organic SEO to boost visibility in target markets and drive sustained engagement.
- By layering in advanced audience targeting based on income, financial behavior, and intent signals, we aligned messaging across channels to ensure every tactic worked together to attract and convert qualified prospects efficiently.