

Increased AUM by

+32%
in 2022

vs 2021, and

+44%
in 2023

from

\$287M
in 2022**\$414M**
in 2023

The Problem:

Although they were big on traditional advertising mediums, such as hosting seminar events and running TV commercials, Goldstone Financial Group had little to no online marketing strategy when we first started working together. They knew they had plenty of marketing material to share with their target audience (50-70 y/o retirees and those nearing retirement), but they didn't know how to best go about it.

The Solution:

As WGA began working on the online Goldstone Financial brand, we first established a revamped brand guideline document that would work well online and could be carried over into traditional/print mediums at events and on marketing collateral. The next and most important initiative we took was establishing their online presence in a way that could easily scale and remain consistent. This allowed us to engage with them a solid Google and Meta Ads strategy, a weekly email newsletter segmented by clients and prospects with tailored content for each, and established partnerships with local ads distributors and local media opportunities on highly-rated news outlets and websites, which included Bloomberg, Nasdaq, Yahoo! Finance, AP News, CBS, FOX, WGN, and more. We helped Goldstone tap into uncharted online growth, using strategic online advertising, SEO, and tailored press releases to make them one of Inc. 5000's fastest-growing American companies, within a little more than just one year of working (and winning) together.

The Win:

These efforts helped increase Goldstone's AUM (assets-under-management) by **32%** in 2022 vs 2021, and then helped further expand their AUM from **\$287M in Summer 2022 to \$414M in Summer 2023**, an increase of **44% year-over-year**.