

Building a Brand with Strategic Marketing Initiatives

How Concentus Wealth Advisors Chose Graham Media Partners To Grow Its Brand

Overview

Dedicated to providing experiences that align clients' financial decisions with their values and goals, Erik Strid, his brother Paul, and their father Gerald (Zeke) founded Concentus Wealth Advisors as a registered investment advisor (RIA) in February 2014. Now a busy advisory practice with over \$500 million in assets under advisement, the firm's team is committed to delivering exceptional client experiences.

Between managing a successful advisory practice and working directly with clients, Erik, Paul, and Zeke had little time to develop and promote the company brand. To attract prospects while retaining their existing clients, Erik and team needed a marketing strategy that would help grow the business.

Solution

After meeting with Concentus to understand the firm's goals, the team at Graham Media Partners developed a multifaceted strategy and plan to build a strong foundation for growth and enable ongoing engagement with clients and prospects.

✓ BRANDING

A brand identity built around a consistent voice and message, backed by an updated logo and unique, easily identifiable imagery across all materials.

✓ SOCIAL MEDIA

Ongoing social media posts on major platforms, including LinkedIn, Twitter, and Facebook, with a focus on thought leadership, easy-to-understand advice, and sharing the culture and individuals behind the brand.

✓ THOUGHT LEADERSHIP

Activities to build Erik as an expert and trusted friend, including blog posts, videos, and dedicated social media posts from his personal channels.

✓ CLIENT COMMUNICATIONS

Monthly newsletters featuring selected updates and materials to support financial literacy and showcase the value of the team.

INDUSTRY: Financial services

SIZE: Small to midsize

SERVICES PROVIDED:

- Marketing planning and execution, branding
- Social media
- Thought leadership
- Client communications
- Website design
- Ongoing consulting

RESULTS:

1. Increased LinkedIn engagement 16X
2. Grew website traffic by >250%
3. Boosted Facebook engagement by >2,400%

✔ WEBSITE DESIGN

A project to revamp the firm's website based on updated messaging, new branding, and a better understanding of key targets, as well as ongoing updates to keep the content up to date.

✔ CONSULTING

Ongoing advice and oversight to support decision making and internal activities.

"We love working with the team at Graham Media Partners. We view them as an extension of our own firm. They continue to help us with our overall marketing and social media strategy. They updated our website and strengthened our brand. They are creative, fun, and easy to work with. We look forward to working with them for many years."

- Paul Strid, Founding Principal & COO, Concentus Wealth Advisors

Select Results



Grew website traffic by >250%

Currently ranked #2 in website traffic across a network of ~50 advisor firms.



Increased LinkedIn engagement 16X



Boosted Facebook engagement by >2,400%

Currently ranked #2 in Facebook reach across a network of ~50 advisor firms.

A Valued Partner

Working closely with the team at Concentus, Graham Media Partners continues to serve as a valued partner in marketing, providing ongoing guidance and support that delivers results and meets the firm's goals.

"The value of working with the Graham Media Partners team has been paramount. Their strategic thinking has given us a defined voice and vital differentiation in a busy marketplace."

- Erik Strid, Founding Principal & CEO, Concentus Wealth Advisors

To learn more about Concentus Wealth Advisors, please visit www.concentuswealth.com.

Learn how Graham Media Partners can help you execute marketing initiatives that deliver results.

Grahammediapartners.com | info@grahammediapartners.com | 610.688.2060

