

CASE STUDY

FROM INSTITUTIONAL TO RETAIL

Building a Scalable Advisor Marketing Platform

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CHALLENGE

ACD is a commercial real estate investment manager with a long history of acquiring and managing institutional-quality assets, specializing in grocery-anchored and grocery-shadow retail, small-bay industrial, and self-storage. When ACD decided to market its investment offerings to the retail wealth channel, the firm faced the challenge of reaching an audience with different needs, expectations, and decision-making processes than a friends & family capital raise. ACD recognized the endeavor would require strategic planning and careful positioning in order to gain entry and traction in this specialized market.

SOLUTION

ACD engaged Marketing Intent as their leadership team's strategic partner in conceptualizing, shaping, and building a dedicated financial advisor marketing platform. We began with ACD's fundamentals, first defining the firm's brand identity, core value proposition, investment philosophy, and product positioning in order to develop concise advisor-focused messaging. We recommended a sales-driven marketing approach to directly support the external sales team in articulating and promoting ACD's investment offerings, sector expertise, portfolio positioning and competitive advantages. Next, we developed an integrated financial advisor marketing system, intentionally designing each deliverable to support a broader advisor journey rather than as a standalone piece. The system included flyers and fact sheets, educational content, webinars, promotional emails, presentation decks, and thought leadership pieces, as well as critical HubSpot CRM marketing/sales integration and transparency.

IMPACT

Building a sales-driven financial advisor marketing platform allowed ACD to successfully enter the retail wealth channel, raise brand awareness among financial advisors and pursue capital raising. The sales team engages financial intermediaries with clear, concise messaging that tells ACD's investment story in a way that resonates with advisors and ensures a consistent experience across every communication touchpoint. Additionally, the marketing processes put in place for ACD's retail channel launch are scalable and will support the firm's future growth across additional fund offerings.

Grabbing the attention of busy financial advisors or introducing a new alternative investment into a crowded market takes industry expertise and sophisticated strategic planning.

If your team could use our help marketing your firm or funds, we'd love to hear from you and learn more about your goals.

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Marketing Intent is a sales-focused marketing agency specializing in the alternative investments industry. We have decades of experience helping asset managers explain their investment offerings to financial advisors and investors with clear messaging and compelling design. We deliver strategy, copywriting, design, branding, website design and development, print and digital marketing.



40+ YEARS
of marketing to
financial advisors



30+ YEARS
of experience in alternative
investment marketing



\$8 BILLION
of capital-raising marketing
support at Dividend Capital/
Black Creek Group

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