



Case Study

GLADSTONE COMPANIES



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GLADSTONE

Challenge

Gladstone Management Corporation is a privately-held investment adviser managing \$4.0B of AUM across four publicly-traded funds. After severing ties with its managing broker/dealer in late 2020, Gladstone began building out its own distribution team in 2021. Rather than hiring an in-house marketing team, Gladstone reached out to Marketing Intent to explore how to best support its sales team with marketing.

While Gladstone was familiar with raising capital through financial advisors, their suite of marketing materials was limited to offering materials with little in the way of the story behind their asset classes (industrial and office commercial real estate and farmland). They had limited brand recognition in the marketplace and their sales team struggled to engage advisors in meaningful conversations about their preferred securities offerings.

Solution

We developed a digital marketing plan to increase Gladstone brand awareness around its preferred securities offerings as well as its asset classes — farmland in particular. With no internal marketing resources, we built out the marketing infrastructure for Gladstone to support content distribution, track advisor engagement in Salesforce and proactively communicate planned marketing activity with their sales team.

Impact

As a result of Marketing Intent's work, the Gladstone sales team has increased conversations with advisors — some they've never spoken to before. Capital raising has increased, and marketing plans have been created two quarters in advance to sync marketing efforts and sales outreach.



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.

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