



BRONCO FINANCIAL
Inspiring Prosperity

Marketing Strategies

A Prosperity Focused Three-Point Plan



Content

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Bronco Financial

- Wealth management for high-net-worth clients across the USA
- 35 employees, 3 state offices, award-winning performance
- Mission: “Helping people define, build, and enjoy prosperous lives”
- Values: Client focus, community, culture, excellence

DM



Engage clients through authentic, value-driven online presence

Create unforgettable, mission-aligned client experiences



EVENTS

OUTREACH



Deliver tailored communications to produce trust

Create innovative marketing strategies that reflect the mission and accelerate growth



GOAL

Create a professional and informative online presence that speaks to high-net-worth clients

Highlight Bronco's knowledge/team/community impact

Drive engagement and conversions

Social Media Platforms

LinkedIn: Created for professional networking/targeting successful individuals

YouTube: Target affluent markets seeking financial insights and education

Instagram: Engage high net worth clients and enable an avenue for story-telling

Facebook: Target based on demographics, interests, behaviors, and life events

Content Topics

LinkedIn/YouTube (30%): 2-3 minute YouTube/LinkedIn videos on wealth planning

- Repurposed as Instagram & Facebook for a broader reach

Community Impact (25%): Stories of volunteer events and charity partnerships

Behind the Scenes team stories (20%): Advisor Q&As, Firm Highlights & Excellence

Client Journey Highlights (15%): Success stories and holistic planning

Event Teasers (10%): Sneak peeks of upcoming client events & Interactive polls

Boosting Strategies

Prosperity Perspectives (YouTube, LinkedIn): Target: Affluent professionals, age 35-70 / Boosted via YouTube pre-roll ads and LinkedIn sponsored content

- Example: Video on tax strategies boosted to financial planning groups

Community Impact (Instagram, LinkedIn, Facebook): Target: Socially conscious clients, local communities

- Geo-targeted boosts in office states (e.g., charity event posts)

Event Teasers (All Platforms): Target: Existing clients and warm leads

- Boosted to segmented CRM lists (e.g., high-net-worth prospects)

Innovative Tactic: Use AI-driven ad optimization to adjust boosting in real-time based on engagement

- Weekly boosts (3-4 posts), with A/B testing for max ROI



25% increase in Engagement

10% rise in prospect leads

Branded as expert & community centric

Higher client retention with consistent communication

Event Experience

Financial Forum

- 1-day interactive event for 60 high-net-worth clients/prospects
- Location: Upscale urban venue
- Format: Workshops, networking, and a charity awareness event
- Combines financial education with charitable elements
- Appeals to high-net-worth clients' desire for innovation and exclusivity
- Aligns with Bronco's mission through prosperity-focused activities

Attendee Experience

- Educational:
 - Breakout sessions on niche topics
 - Live Q&A with Bronco advisors
- Exclusive:
 - Cool setting with high-end catering
 - Personalized takeaways
- Community-Driven:
 - Featured charity to attend & present heartfelt stories
- Fun:
 - Prizes
 - Evening cocktail reception with live music

Expected Outcomes

- 85% attendee satisfaction
- 12-18 new referrals from attendees
- Enhanced client loyalty
- Viral social media buzz from event
- Local media coverage of charity contributions



Event Timeline

4 months planning



Month One

Venue/Speaker
Selection/Vendor
Contracts



Month Two

Invitations/Digital
Promotion



Month Three

Rehearsals



Month Four

Final Logistics

OUTREACH

Create & Deliver tailored, mission-driven email communications
Drive event attendance and advisor consultations
Reinforce Bronco's expertise and values



Messaging

Holistic wealth management as a journey
Community impact as a shared value
Bronco's leadership in client experience

Warm, professional, aspirational
Reflects "define, build, enjoy" mission

Biweekly newsletter
Event-specific blasts
Quarterly accolade updates

Content Creation

- Forum invitation
- Monthly Virtual "Market Outlook" webinars
- Community volunteer days
- Accomplishment Highlights
 - Award Recognition
 - Team milestones
- Educational Content including tips, market updates & trends
- Call-to-Actions including event RSVPs & advisor meetings
- Engage with social media posts



Branding

Email Template: Sleek design with Bronco's logo and color scheme

Event Flyers: Financial Forum and Webinars

Accolade Flyers: Awards with client quotes

Tools: CRM for personalization & analytics

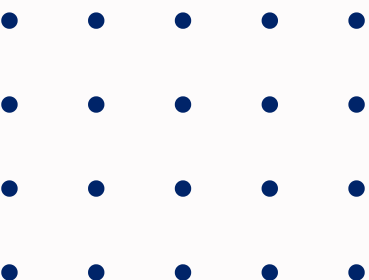
Adobe Creative Suite or Canva



Expected Outcome

- 35% open rate, 12% click-through rate
- 25% RSVP rate for Financial Forum
- 15% increase in consultation bookings
- Produced client trust through personalized outreach
- Positive feedback on email interactivity

Sales



Summary

Digital Marketing

Establishes Brand as Expert through consistent storytelling narratives focused on education & advancement.

Events

Drives referrals and increases loyalty while establishing Bronco's as an exclusive and high end expert in their field.

Consistent Online Outreach

Utilizes consistent communication to produce trust and increase memorability, while enhancing engagement and knowledge of events and services.

The Overall Idea


Embodies the charitable contributions and positions of Bronco Financial, while setting up the company as an innovative expert in their field.




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THANK YOU

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