

# Industry *Focus Areas*

START UP



MIDDLE MARKET



LARGE INSTITUTIONS



WEALTH  
MANAGEMENT

- BDs, RIAs and Advisor Groups
- Firm positioning, Recruitment and Client Acquisition Strategies, Awareness Campaigns, Markets Planning, Advisor Segmentation



INVESTMENT  
MANAGEMENT

- Major established players, Ad Boutiques, Investment Firms
- Portfolio Strategies; Wholesale Support Marketing, Distribution (WHs) Strategies



LIFE INSURANCE  
& ANNUITIES

- National and Regional Carriers, Home Offices and Fields, Life Groups
- Product Strategies, Field and Distribution Strategies, Culture Programs, Recruitment and Market Strategies, Acquisition Strategies



FINTECH

- Client Reporting & Performance, Hedge Fund Administration, CRM, Alternative Platforms
- Product Launch Strategies & Campaigns, Positioning, Strategic Visualization