

Eulerity

PARTNER CASE STUDY

LEADING FINANCIAL SERVICES FIRM

AT A GLANCE

COMPANY

Anonymous

INDUSTRY

Financial Services

CLIENT DESCRIPTION

A leading global financial institution with a century-long history has been providing trusted wealth management solutions to individuals, families, and institutions. Offering a comprehensive suite of services including private banking, credit, investment management, asset management, estate and trust, this firm caters to the needs of high net worth and institutional clients worldwide.

"Eulerity has helped us build onto our tech stack in a way that's moving our business forward. Their marketing automation approach personalizes outreach and streamlines processes, allowing advisors to focus on building deeper relationships with their clients and prospects. This not only enhances the ability to provide exceptional service, but also empowers advisors to effectively market themselves and achieve impressive results within their local market. We are very excited to continue this partnership and for what lies ahead."

HEAD OF MARKETING

CHALLENGES

This brand's team was interested in developing a digital marketing program to support its local advisor network. The firm was searching for a partner that could deliver a streamlined and scalable program to power local advisor campaigns – creative execution, cross-channel media buying, campaign optimization, and performance reporting with complete transparency and brand compliance control, while also providing account management support to Corporate Field Marketing and participating advisors.

SOLUTION & RESULTS

With Eulerity's local advisor program, advisors are now able to build their personal brands with consistent messaging by attracting and influencing prospective clients during their buying journey across multiple online touch points. This includes advisor campaign localization and customization, low management fees, direct advisor communication and support, and corporate visibility into advisor participation and local campaign performance. Based on positive program results, new advisor adoption continues to increase.



Boosted Brand Awareness: Eulerity ads drove an average of **over 20,000 ad views** each month to drive local advisor awareness.



Increased Local Traffic: Based on a modest monthly budget, Eulerity ads were responsible for driving over:

- **80% of all monthly new visitors**
- **57% of all monthly form submissions**
- **67% of all monthly click-to-calls per advisor**



Sustained Growth: Compared to the same time last year, advisors utilizing Eulerity saw an **average 561% increase in new site visitors.**

**Data Period: February - July 2024*