Profile of a Powerhouse Firm

Explosive Growth in Action

Advisors Excel

Advisors Excel has doubled AUM from $20 billion to $40 billion in just five years—showcasing the results that come from aligning marketing, sales, branding, and advisor enablement into a high-leverage growth system.

Their approach is clear: modern growth is driven by repeatable campaigns, strategic data utilization, and deeply aligned partnerships.

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Precision, Personalization, and Persistent Reach

Over the past five years, Advisors Excel has doubled AUM from $20 billion to $40 billion—driven largely by a relentless focus on organic growth. Their strategy combines layered marketing funnels, personalized client experiences, and long-term nurturing across hundreds of affiliated firms.

“We’ve seen oversized impact when firms dedicate resources to staying in front of their list—current clients, past prospects, anyone who previously responded to marketing,” said Matt Neuman, Chief Strategy Officer at Advisors Excel. “This is something that came out of COVID. Clients needed more contact and more education, and that has only accelerated over the last three or four years.”

This philosophy shows up in tangible results. Rob Russell of Russell Total Wealth and Wellness brought in more than $150 million in 2024 alone, with $60 million coming from existing clients and referrals, and another $50 million from coordinated multi-channel campaigns, including live events and local media.

Another striking example: Chad and Bailey Ensign in Arizona turned a $6,000 investment in a single live workshop into a 47-to-1 ROI by not only closing immediate business but also nurturing attendees over time, generating referrals, and deepening wallet share with existing clients.

Neuman summed up Advisors Excel’s approach this way: “Organic growth happens fastest for firms that have six or eight different marketing funnels running at the same time—live events, radio and television, social media, referral events, affiliate marketing. Knowing which layer to put in first, second, and third sequentially is very important because the cascading effect of one channel bleeding into another is big. And every piece of the sales process is customized and personalized to that office—from the names of appointments to the planning process, deliverables, and ongoing education.”

At the core, Advisors Excel’s system is about filling the funnel and never letting it go cold. With multiple channels pulling in new prospects and consistent, personalized follow-up to nurture them, their firms turn first touches into long-term relationships and sustained growth.

The Snappy Kraken Partnership:

Empowering Scalable Growth

For Advisors Excel, Snappy Kraken has proven to be more than a marketing platform—it is a strategic partner in building and scaling a Modern Growth Stack. As Matt Neuman, Chief Strategy Officer, explained:

“Snappy Kraken helps our affiliated advisors do what they do best—stay face-to-face with clients. It becomes the content management partner behind the scenes… They’ve been progressive, responsive, and invested in helping us deliver enterprise value that surpasses other platforms.”

The Takeaway

Modern growth for financial advisory firms isn’t accidental—it’s engineered. Advisors Excel demonstrates how scalable funnels, personalized execution, and strategic partnerships fuel sustainable growth.

Ready to Modernize Your Growth Stack?

Snappy Kraken’s enterprise platform powers advisor growth with centralized content control, automated lead engagement, and full-funnel visibility.

EXPLORE THE PLATFORM

ADVISORS EXCEL