



# How a Solo Advisor Runs Marketing Like a Full Team

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From “*I don’t have time for marketing*” to 94,000+ emails and 1,100+ form submissions using Snappy Kraken.

Kevin Wade runs his entire advisory practice on his own.

No assistant. No marketing team. No extra bandwidth.

Just him.

And like most solo advisors, he wasn’t lacking strategy; he lacked time.

Staying in touch with clients meant manually writing newsletters, sending them via Outlook, and hoping they landed. There was no tracking, no consistency, and no easy way to know what was working.

“I knew I could be doing more,” Kevin says. “I just didn’t have the time to do it.”

The challenge wasn’t knowing *\*what\** to say.

It was finding a way to **say it consistently—without adding more work.**

With Snappy Kraken, Kevin turned communication from a manual task into a system.



# Meet the Advisor: Kevin Wade

## Financial Advisor

Kevin Wade operates as an independent advisor, running his own practice while managing every aspect of the business himself—from client relationships to operations to marketing.

His specialty is **comprehensive retirement planning**, helping clients build a clear, long-term roadmap for life after work.

“I want clients to know where their income is coming from, how it’s going to get there, and how it supports their lifestyle,” Kevin explains.

His approach goes beyond investments to include:

- Retirement income planning
- Tax strategy and annual tax planning
- Social Security optimization
- Healthcare and long-term expense planning
- Lifestyle and retirement budgeting



The goal is simple: create a plan that works so well, clients don’t need to worry about it.

Kevin defines success in a way that reflects that philosophy.

“A perfect review meeting for me is when we don’t talk about finances at all,” he says.

“We’re just catching up on life, because the plan is already working.”



# Discovering a Better Way

Kevin first learned about Snappy Kraken at an industry event through his broker-dealer network, Centennial Advisors.

At the time, he was already feeling the pressure of running both the **business side and advisory side** of his practice.

“I didn’t realize everything that goes into running a business,” he says. “I was constantly looking for content and a better way to stay in touch.”

When he saw what Snappy Kraken offered, the **value was immediately clear**.

“I put it in all caps in my notes,” Kevin recalls. “And I scheduled a demo right away.”

What stood out most wasn’t just the content—it was the **ease of execution**. He found:

- Ready-to-use campaigns
- Timely, relevant topics
- Built with compliance in mind
- Simple to send and manage

“I don’t have to create anything,” Kevin says. “I just scroll through, pick a topic, send it to compliance, and hit send.”



# From Manual Effort to Consistent Engagement

After implementing Snappy Kraken, Kevin's communication strategy changed almost immediately.

Instead of sending a single monthly email, he now delivers **ongoing, multi-touch campaigns** that keep clients and prospects engaged over time.

The difference was noticeable. Not just to Kevin, but to his clients.

"I've had a lot of clients thank me for the content," he says. "They like the depth and the fact that it's more interactive."

Rather than receiving a static email with an attachment, clients now experience:

- Structured email series
- Timely, relevant topics
- Engaging, easy-to-consume content

"It's not just one email anymore," Kevin explains. "It's a series that people can actually engage with."

And because the content stays aligned with current events and market conditions, it feels relevant and valuable.

"Snappy Kraken is always on top of what's going on," he says. "That's something I didn't have the bandwidth to do on my own."



## A Competitive Edge in a Small Market

Kevin operates in a small town of roughly 3,000 people, with multiple advisors competing for the same clients.

Standing out matters.

And for Kevin, Snappy Kraken has become a key differentiator.

“I guarantee I’m the only advisor here using a platform like this,” he says.

That difference shows up immediately when engaging new prospects.

“As soon as I get a prospect’s information, I can add them to Snappy Kraken,” Kevin explains. “Before we even schedule a meeting, they’re already receiving high-quality content.”

That early engagement helps position Kevin as a trusted expert from the very first interaction.

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## Doing the Work of a Full Marketing Team—Alone

At a high level, Kevin sees Snappy Kraken as a force multiplier.

It allows him to operate like a fully staffed firm, without actually having one.

“It’s my creative designer, my writer, and my researcher,” he says.

For a solo advisor, that’s a game-changer.

Instead of spending hours creating content or trying to keep up with trends, Kevin can focus on what matters most: his clients.

“Snappy Kraken lets me do things I would never have time to do on my own,” he says.



## Results with Snappy Kraken

For Kevin, Snappy Kraken didn't just make marketing easier—it made consistent communication measurable.

Before, staying in touch meant writing newsletters by hand, sending them through Outlook, and hoping they resonated. Now, Kevin can stay visible with clients and prospects “in the snap of a finger” by simply adding an email address.

In a small town with six competing advisors, consistency gives Kevin an edge. Prospects begin receiving valuable content before the first meeting—building trust early.

**2,000+**  
contacts reached

**94,000+**  
emails sent

**28,000+**  
opens

**30%**  
open rate

**16,500+**  
clicks

**17,400+**  
landing page views

**1,100+**  
open rate

These results show that Kevin's audience isn't just receiving content, they're engaging with it.

For a solo advisor, that visibility matters. Kevin can see who is paying attention, what they care about, and when it may be time to follow up.

## More Than Financial Advice

One of the unexpected benefits Kevin values most is the **breadth of content** available.

Not all communication has to be about markets or portfolios. Snappy Kraken allows him to share content on topics like:

- Identity protection
- Retirement lifestyle planning
- Travel and life transitions
- Personal goal setting

“Not everything has to be dollars and cents,” Kevin explains. “You can help people in other areas of their lives, too.”

That broader approach strengthens relationships and reinforces trust.



## Advice for Other Advisors

For advisors considering tools like Snappy Kraken or entering the industry altogether, Kevin offers simple but powerful advice:

Start with the right mindset.

“You have to want to help people truly,” he says.

The financial advisory business comes with stress, uncertainty, and factors outside your control. But for those who care about making a difference, it can be incredibly rewarding.

And when it comes to marketing?

Use tools that help you extend that value beyond meetings.

“Don’t just focus on the financial side,” Kevin says. “Use the tools available to help improve your clients’ lives overall.”

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## A System That Scales with You

For Kevin Wade, Snappy Kraken has become more than a marketing tool; it’s a way to scale communication, stay relevant, and grow his business without adding stress.

What once required hours of manual effort now happens with consistency and ease.

And in a business where trust and visibility matter, that consistency makes all the difference.

