



# 250% Growth for an Independent LPL Advisory Firm

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How Pacific Wealth Management Group increased business by 250% with Freedom360

For many advisory firms, growth eventually hits a ceiling.

The team at **Pacific Wealth Management Group**, an independent firm under **LPL Financial**, had built a strong business, but like many successful firms, growth depended heavily on referrals and the advisors' personal outreach.

The Founder, Kevin Lonergan, wanted a way to help newer advisors attract and convert clients while continuing to expand the firm's overall growth. The challenge wasn't strategy, it was time for consistent execution.

By implementing **Freedom360**, Snappy Kraken's fully managed marketing program, the firm added a scalable marketing engine to support their incoming leads and growth.

Instead of relying solely on individual outreach, Pacific Wealth now runs coordinated campaigns across email, social media, and landing pages that keep the firm visible and create new entry points for conversations with prospective clients.

The result has been a meaningful expansion of their marketing reach—and a **250% increase in business growth**.



# Meet the Founder: Kevin Longergan

**Founder, Pacific Wealth Management Group | Independent Firm under LPL Financial**

Kevin Lonergan founded **Pacific Wealth Management Group** with a clear goal: build an independent firm where advisors could collaborate, grow their practices, and provide comprehensive planning without the constraints of a corporate environment.

Today, the firm operates as a **multigenerational advisory team**, bringing together CFP® professionals, a CPA advisor, and a Certified Divorce Financial Analyst to help clients navigate complex financial decisions.

“We have a variety of knowledge in the firm,” Kevin explains. “Everyone can collaborate and help each other so every client gets comprehensive financial planning.”

Because the firm’s office is located near the **Gilead biotech campus**, many of their clients come from the **biotech and technology industries**, along with attorneys and business owners managing retirement plans.

As founder, Kevin balances advising clients with leading the firm, supporting advisors, guiding strategy, and helping the business grow.

## Leadership That Prioritizes the Team



Kevin believes leadership begins with trust. Many of the advisors at Pacific Wealth Management Group have worked alongside him for more than a decade. When Kevin decided to build his independent firm, several advisors chose to follow him.

**“People know I’m good on my word,”** Kevin says. **“They know I have their back.”**

That mindset shows up in the way Kevin supports his team.



# Measuring Success Through Growth

While leadership and trust matter deeply to Kevin, he also measures success through growth.

Over the past **two and a half years**, Pacific Wealth Management Group has experienced approximately **250% growth in assets under management**. Kevin credits that growth to the combination of strong lead generation and a system that helps the firm consistently nurture those opportunities.

Through Snappy Kraken's **Freedom360**, the firm is able to stay in front of prospects with timely content and consistent communication, helping move leads from initial interest to client relationships.

**“We had a large source of leads. Without something like Snappy Kraken, we wouldn't have had a way to manage or nurture those relationships.”** Kevin explains.

By pairing lead generation with a structured marketing system, the firm has been able to turn incoming interest into conversations, referrals, and long-term clients—fueling the firm's continued growth.

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# Turning Marketing Into a Consistent System

Like many advisors, Kevin understood the importance of marketing but struggled to maintain a consistent cadence. Between managing the firm and serving clients, creating campaigns manually simply wasn't realistic.

Kevin discovered Snappy Kraken at the **LPL Focus Conference** in San Diego. After seeing the platform demonstrated, he immediately recognized how a system like **Freedom360** could help the firm stay visible and engaged with their audience.

**“To me, it was the perfect system - exactly what we needed,”** Kevin says.

What stood out most was that Freedom360 didn't just provide content—it provided **execution**.

Campaigns could be launched across email, social media, and landing pages automatically, using professionally created content that had already been reviewed with compliance considerations in mind. Instead of building campaigns from scratch, the firm could rely on a structured system designed specifically for financial advisors.



# Consistent Marketing Without the Operational Burden

Since implementing Freedom360, marketing at Pacific Wealth Management Group has become far more consistent. Campaigns run regularly across multiple channels, allowing the firm to maintain visibility with clients and prospects throughout the year. For advisors, that consistency matters more than anything.

Freedom360 also provides visibility into how contacts engage with campaigns, showing who is opening emails, clicking links, and interacting with marketing content. That insight helps advisors turn engagement into conversations.

**“Advisors can see who’s interacting with the content,”** Kevin explains. **“Then they reach out and say, ‘Hey, I noticed you’ve been reading some of these.’”**

Those conversations frequently lead to introductions, referrals, and new relationships.

## Results with Freedom360

By combining lead generation with the ongoing outreach enabled by Freedom360, the firm has been able to stay in front of prospects, identify engagement, and convert interest into meaningful client conversations. Growing their business 250% in the process.

### Campaign Results

**1,000+**  
contacts reached

**24,000+**  
emails sent

**600+**  
clicks

**300+**  
landing page views

These campaigns give advisors visibility into which prospects are engaging with their content, making it easier to follow up at the right time and turn interest into meaningful conversations.



# Expanding Opportunities Through Engagement

Today, **half of the advisors at Pacific Wealth Management Group actively use the Freedom360 system**, particularly those who are focused on expanding their practices.

For those advisors, marketing is no longer an occasional task, it's an ongoing system that runs alongside their client work.

With consistent campaigns running in the background, the firm is able to stay connected with its audience without placing additional demands on the advisors' time.

“**At a high level, it's become a very important part of our marketing. The advisors who use it rely on it every week.**”  
—Kevin Lonergan

The ability to see engagement activity and follow up with interested contacts has also opened doors to entirely new conversations and markets.

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## Advice for Other Independent Advisors

After building and growing an independent firm, Kevin offers straightforward advice to other advisors evaluating marketing solutions.

Start with a system that makes marketing **consistent and easy to maintain**. “Have something systematic,” Kevin says. “Something easy and simple—but take the time to understand how it works.” He also cautions advisors not to choose marketing tools based on price alone.

“Don't be cheap,” Kevin says with a laugh. “Just because something costs less doesn't mean it's going to give you the results you want.” For Kevin, investing in a system that consistently executes marketing has proven well worth it.

## A Marketing Engine That Supports Firm Growth

For Pacific Wealth Management Group, implementing Snappy Kraken's Freedom360 helped transform marketing from a sporadic effort into a consistent growth engine. Instead of worrying about building campaigns manually, the firm now benefits from a fully managed system that keeps them visible, engaged, and connected with clients year-round.

And as Kevin continues to grow the firm, that consistent presence in the market helps ensure the next wave of opportunities is always on the horizon.

