



THE **FINANCIAL ADVISORS** GUIDE TO

# High-Net-Worth Marketing

Land Bigger Deals, Deliver More Value, and Grow Faster

# Introduction: Why This Market Matters Now

The opportunity to grow your firm by serving high-net-worth (HNW) clients has never been greater—or more misunderstood.

There are over 23 million individuals in the U.S. with \$1–5 million in investable assets. A majority of them are either unadvised or open to switching advisors.\* But despite this, most advisors struggle to reach them.

Why? Because they're using the wrong approach.

The truth is, high-net-worth clients think differently. Their concerns are more complex. Their expectations are higher. And they've grown increasingly resistant to one-size-fits-all advice or cookie-cutter marketing.

## But here's the good news:

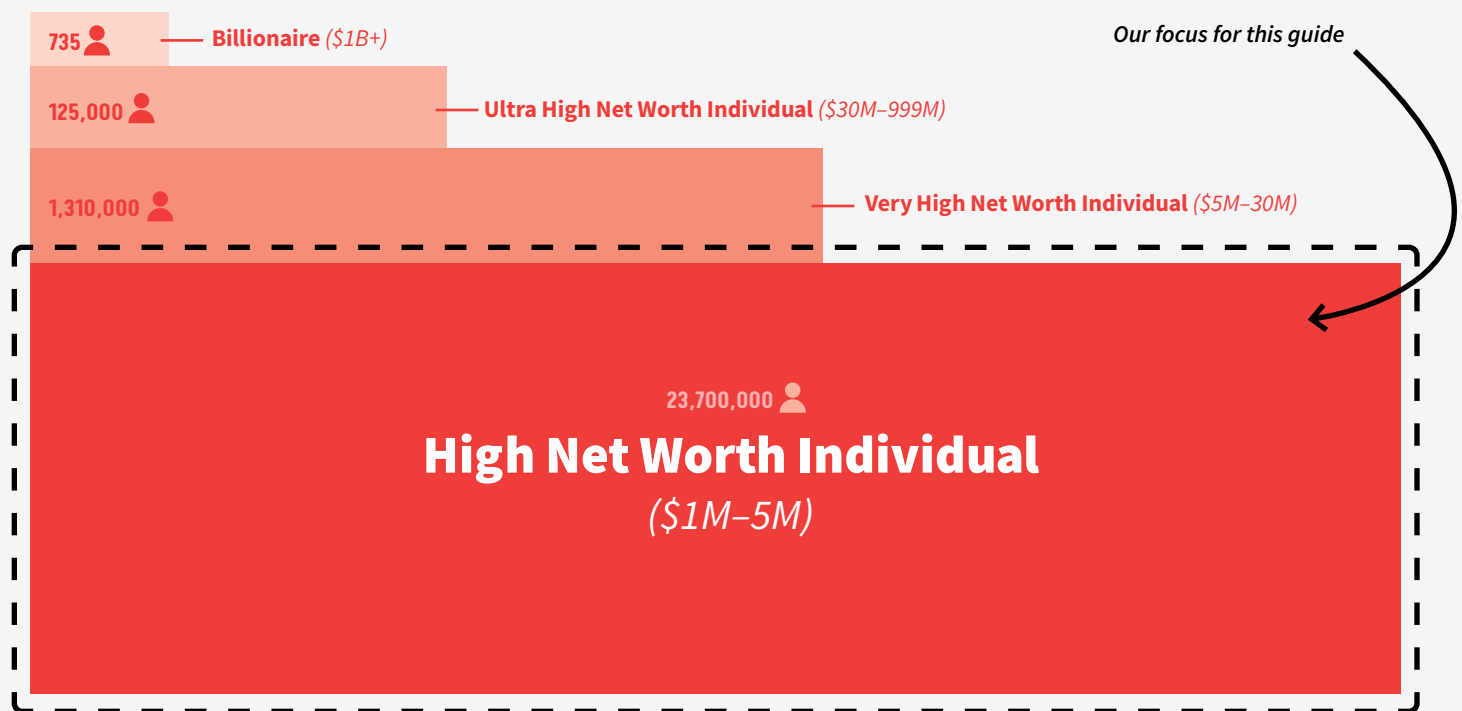
These clients are not out of reach. In fact, they're more digitally engaged than most advisors realize.

According to a 2023 PwC study:

- **98% of high-net-worth individuals access the internet daily**
- Most spend up to **three hours of personal time online every day**
- **85% use more than three digital devices**, with mobile leading the way

**They're online. They're active. And they're absolutely reachable with the right digital strategy.**

We've seen it firsthand—through years of work with over 10,000 advisors in all 50 states.



Source: 2023 survey of 800 HNW investors

## How We Know What Works

**This guide isn't based on guesswork or opinions. It's grounded in real data—at scale.**

Here's what powers the insights inside:

- *10,000+ advisors marketing in all 50 states*
- *600,000+ digital campaigns analyzed*
- *67 million emails sent*
- *39 million contacts tracked*
- *39 million+ page views*
- *250 million+ total data points analyzed*
- *Thousands of HNW clients interacting with our content*

### **What does that mean for you?**

This isn't theory. These are proven strategies that top-performing firms are using right now to attract and win high-net-worth clients.

This guide was built to close the gap between what affluent clients want and how most firms try to attract them. Whether you're an individual advisor or part of a growing enterprise, this is your playbook for building a smarter system to reach, win, and retain high-value clients.

Inside, you'll learn:

- What sets HNW clients apart—and why most marketing misses the mark
- How to uncover hidden affluent prospects already in your CRM
- Proven strategies and content themes that resonate with HNW audiences
- A complete system for automating engagement, follow-up, and conversion
- How to deliver ongoing value that turns clients into advocates

Along the way, we'll show how modern tools like data enrichment, behavioral automation, and intelligent content can simplify the process—and how firms using Snappy Kraken are putting these systems to work to land clients worth millions.

**This is more than a marketing guide. It's a roadmap for growing faster, serving better, and standing out in a competitive market.**



# Understanding the High-Net-Worth Mindset

Attracting high-net-worth clients requires more than great service or broad promises. These individuals have unique priorities, higher expectations, and a different set of concerns compared to the average investor. If your messaging doesn't reflect that, you're likely to be ignored—no matter how capable you are.

## What Really Matters to the Affluent

Financial concerns aren't just about growth. They're about preservation, legacy, privacy, and impact. For many high-net-worth individuals, success is measured by what they protect and pass on—not just what they accumulate. Their decisions are often influenced by family dynamics, philanthropic values, and lifestyle goals.

Their most pressing concerns often include:

- Wealth preservation and risk mitigation
- Succession planning and family education
- Charitable giving and social responsibility
- Advanced estate planning
- Privacy and data security
- Access to exclusive experiences or networks

If your content and communication don't speak directly to these priorities, it won't stand out—especially in a market flooded with generic financial advice.

## Why Most Advisor Marketing Falls Flat

Many advisors claim to offer “comprehensive financial planning” or “personalized service,” but those are table stakes—not differentiators. High-net-worth prospects aren't just evaluating your capabilities. They're evaluating your relevance.

It's not enough to say you offer estate planning. They want to know you can guide intergenerational wealth transfers without family conflict. It's not enough to mention risk management. They want confidence that their assets, lifestyle, and reputation are protected across every dimension.

## Position Yourself as a Specialist, Not a Generalist

Affluent prospects are far more likely to engage with advisors who demonstrate an understanding of their world. That doesn't mean you need to offer a full family office—but it does mean your messaging, branding, and digital presence should reflect their reality.

From your website and logo to the tone of your emails and the quality of your video content, everything communicates who you are—and who you serve. High-net-worth individuals are evaluating whether you feel like “their kind of advisor” before they ever book a meeting.

Whether you're an individual advisor or a firm supporting hundreds, aligning your marketing with the affluent mindset begins with the right content—and the right first impression.

## Show, Don't Tell: 3 Campaigns That Resonate with the Affluent

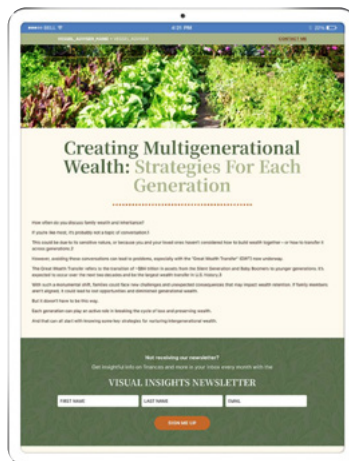
Not all content is created equal. The best campaigns for affluent audiences don't just educate—they reflect the priorities, values, and challenges high-net-worth individuals care most about.

Below are three examples of done-for-you campaigns built specifically for this market. Whether you use Snappy Kraken's platform or not, these campaigns demonstrate what effective high-net-worth marketing looks like in action.

### Campaign #1

## Creating Multigenerational Wealth

Multi-Touch Prospect Campaign | Email, SMS, and Landing Page



### What It Is:

This visually rich newsletter tackles one of the most emotionally charged topics in finance: how families can work together to build and preserve wealth across generations. It's centered around the coming \$84 trillion wealth transfer and outlines age-specific strategies for Gen Z through Baby Boomers.

### Why It Works:

- Creates emotional connection through the legacy lens
- Encourages intergenerational family conversations (and advisor involvement)
- Breaks down complex ideas into digestible, visual content
- Establishes the advisor as a long-term, family-focused strategist

### Use Case:

- Ideal for advisors who want to spark deeper conversations and position themselves as trusted multigenerational guides.

## Campaign #2

# Building Your Business Legacy

Multi-Touch Visual Newsletter Campaign | Email, SMS, Social, and Landing Page



### What It Is:

Built for business owners nearing transition, this 21-day campaign provides actionable insights on leadership development, succession planning, digital transformation, and long-term financial strategy. It balances the emotional weight of letting go with the tactical planning required to do it well.

### Why It Works:

- Speaks to a niche but high-value audience (business owners)
- Uses data and real-world insights to build trust
- Frames the advisor as a strategic partner in complex transitions
- Offers clear, proactive steps—driving higher engagement

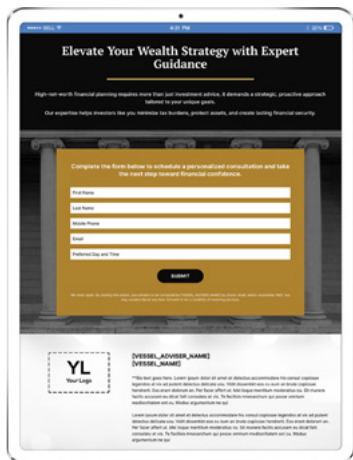
### Use Case:

Perfect for firms focused on exit planning, succession, and high-AUM business owner clients.

## Campaign #3

# High-Net-Worth Prospect Engagement

Multi-Touch Prospect Campaign | Email, SMS, and Landing Page



### What It Is:

A fast-moving campaign designed to turn interest into action. Through a series of emails, SMS messages, and a high-converting landing page, it addresses the most urgent needs of affluent individuals—from tax efficiency to legacy planning—and drives them to schedule a consultation.

### Why It Works:

- Built specifically for HNW prospecting
- Uses urgency, relevance, and clarity to move leads quickly
- Offers solutions to real concerns with professional polish
- Includes disclosures and expert tone for credibility

### Use Case:

Best for advisors or firms actively prospecting for HNW clients and wanting to create pipeline momentum.

Advisors using these campaigns aren't just marketing to the affluent—they're closing the gap between interest and action. And they're doing it with content built on empathy, insight, and strategy.

## How One Advisor Turned HNW Drip Emails Into a \$1M+ Client



*“A CPA referred us to a high-potential client over six months ago. After an initial touchpoint, things went quiet—she had some business to deal with, and we were put on hold. Then she messaged us out of the blue, ready to move forward. She specifically told us it was the emails she had been receiving—through Snappy Kraken—that made the difference. That steady communication kept us top of mind and built trust over time. Snappy Kraken did all the upfront heavy lifting for us.”*

*— Brian Traverso, President, BOLT Wealth Management*

### Outcome:

A \$1M+ client closed after a long delay—thanks to consistent, automated, high-quality communication.

### Why it worked:

- Positioned Brian’s firm as trustworthy, even during a long sales cycle
- Reinforced credibility and expertise through relevant HNW-focused content
- Converted interest into action without constant manual follow-up

## Section 2

# Attracting the Right Clients (And Finding the Ones You Didn’t Know You Had)

Like you saw in the last section, affluent individuals respond to content that reflects their world—legacy, tax strategy, business planning, philanthropy, and wealth protection. But recognizing those priorities is only part of the equation.

The real opportunity comes when you *consistently share that kind of content with your audience*—because chances are, you’re already connected to high-net-worth individuals... you just might not know it yet.

That’s why visibility matters. Every campaign you send becomes a signal. You’re showing clients and prospects that you understand the needs of the affluent. This not only builds trust with those individuals directly—it also makes you more *referable*. When a client forwards your insights on succession planning or tax efficiency to a wealthy friend or colleague, they’re essentially saying, “This is who my advisor is. You should talk to them.”

## The Right Message for the Right Market

Generic campaigns won't win the attention of HNW individuals. The right content speaks directly to their priorities and makes your firm stand out in a crowded space.

A few proven content angles that consistently resonate:

- *Timely financial insights* with clear value (e.g. tax-saving strategies before filing deadlines)
- *Legacy-focused messaging* that invites family discussions and long-term thinking
- *Business owner planning* for succession, retirement, and leadership transitions
- *Exclusive, educational events* that offer value and build trust without hard selling

When your content reflects their concerns—and is delivered consistently—it builds familiarity, credibility, and positioning. You're no longer one of many. You're the advisor who "gets it."

## Where the Best HNW Leads Really Come From

Most high-net-worth clients don't show up from cold ads or mass-market channels. They come from relationships, referrals, relevance—and increasingly, search.

Top lead sources for affluent clients include:

- **Your existing CRM** – Many HNW individuals don't self-identify. Without data enrichment, their financial potential may go unnoticed.
- **Client referrals** – Especially from your most financially successful clients. When leveraged properly, one great relationship can unlock several more.
- **Centers of influence** – CPAs, attorneys, business brokers, and other professionals serving high-income individuals.
- **Networking + niche events** – From industry groups to community causes, face-to-face time still matters—especially when supported by strong follow-up marketing.
- **Your website** – HNW prospects often research quietly before engaging. SEO-optimized websites with relevant blog content, landing pages, and homepage messaging tailored to affluent concerns (wealth preservation, estate planning, philanthropy) can attract organic traffic and convert interest into inquiries.
- **Educational workshops and webinars** – Hosting value-driven events that address real financial concerns can attract affluent prospects without selling.

And the real kicker? Some of your most valuable prospects are likely already in your CRM. They're reading your emails. Attending your events. Just waiting for the right moment.

In the next section, we'll show you how to identify those high-value individuals, prioritize your outreach, and turn passive contacts into active opportunities.



# Identifying & Prioritizing High-Value Prospects

Once you've built a strong marketing foundation—sharing the right content consistently—the next step is making sure you're spending your time on the right people. Not all prospects are equal. Some have significantly greater financial potential, and the firms that grow fastest are the ones who know how to find and prioritize them.

If you've been sending high-quality, HNW-focused campaigns, your next big client might already be paying attention. You just need to know where to look.

## The Big Mistake: Looking Too Far Out

Many advisors assume their best opportunities are people they haven't met yet—out there in the market, waiting to be discovered. In reality, your most valuable leads are often hiding in plain sight:

- They're already in your CRM
- They're already reading your content
- They're already connected to your best clients
- They're attending the same events, workshops, or community gatherings
- They're networking in the same professional or industry circles
- They may even be past leads who weren't ready—until now

The problem? **They don't always self-identify.** They don't volunteer their net worth. They don't necessarily click every email or fill out a form. Without better visibility, they blend in with everyone else.

## Reveal the Hidden Value in Your CRM

Most high-value prospects don't wave a flag. Some may quietly read everything you send but never engage in obvious ways. Meanwhile, a low-value lead might be hyperactive.

That's why relying on engagement alone—opens, clicks, downloads— isn't enough. You need more context. You need clarity. You need data enrichment: layering in financial, demographic, and behavioral insights that help you recognize who actually fits your ideal client profile.

With the right tools, you can:

- Identify prospects with \$1M+ in investable assets
- Filter by income, home value, or likelihood to convert
- Surface contacts who are engaging and financially qualified
- Focus your energy where it will drive the most revenue

## *What Is Data Enrichment (and Why Does It Matter)?*

**Data enrichment tools help you instantly identify your most promising leads.**

These tools pull in financial and demographic insights—like investable assets, income, home value, and likelihood to convert—so you can prioritize the prospects who are most likely to become high-value clients.

When integrated with Snappy Kraken, these tools allow you to:

- Automatically **rank leads by financial potential**
- Filter contacts based on **net worth, income, and engagement**
- Create **smart prospecting groups** for targeted campaigns
- Focus on leads who are both interested and qualified

## Turn Your CRM Into a High-Value Prospecting Engine

Using Snappy Kraken with data enrichment tools make this process easy and automatic. With just a few clicks, you can enrich your contact list, apply smart filters, and group high-potential leads for targeted follow-up or automated nurture.

You can build dynamic groups based on:

- Investable assets
- Age and other demographic info
- Engagement level
- Opportunity score (based on activity with your marketing)
- And much more...

Then, simply connect those groups to specific campaigns. As new contacts are enriched or added to the group, they're automatically subscribed—no manual effort required.

**This turns your CRM + marketing platform into a living, breathing, intelligent prospecting system.** One that not only shows you who to focus on, but also ensures your best leads are always receiving the right message at the right time.

**Key takeaway:** You don't need more leads. You need visibility. The value is already there—you just have to surface it.

## Visibility Over Time = \$1.2M Opportunity

”

*“Snappy’s been pumping out great content as well, so keep that up. I just scheduled a meeting with a \$1.2M prospect because of it. He said my name kept coming up (because I’ve been emailing him since the end of 2018) and he’s finally ready to sit down and talk*

*— Matt S., CFP®, Wealth Advisor, Certified Financial Planner*

### What happened:

- HNW leads often take time to warm up
- Consistency builds familiarity—and eventually trust
- Content + visibility creates mindshare, which creates opportunity

### Why it matters:

- Shows long-term nurture is worth it
- Validates the power of content even without short-term clicks
- Ties directly to the value of a visibility-driven prospecting system

#### Section 4

## The Full-System View – From Click to Client

Attracting high-net-worth clients isn't just about what you say. It's about what happens *after* someone engages.

You need more than strong content. You need a system—a full-cycle workflow that moves someone from passive reader to booked meeting. **Not in a random, manual, one-off way, but through a repeatable process that runs consistently behind the scenes.**

This is where the right technology makes all the difference.

### The Problem with Most HNW Prospecting

Even when advisors share great content and run solid campaigns, they often lose momentum after the first click. The lead downloads a guide... and hears nothing. They open a few emails... and slip through the cracks. Or worse—they schedule a call, and no follow-up systems are in place to build on that interest.

That's not a content issue. **It's a systems issue.**

And when you're trying to win high-value clients, *systems* matter more than ever.

### What a Complete HNW Acquisition System Looks Like

Here's what best-in-class firms are doing to engage, qualify, and convert high-net-worth prospects—without needing a large team or manual effort at every step.

#### 1. Import & Enrich Your Contact List

- Pull in prospects from your CRM, lead generation programs, events, and other sources
- Use data enrichment to enrich contacts with net worth, income, investable assets, and conversion likelihood

#### 2. Apply Smart Filters to Identify High-Value Leads

- Segment by investable assets, age, interests, or engagement behavior
- Build dynamic groups like “High-Value Prospects” or “Warm Business Owners”

### 3. Auto-Enroll Segments Into Targeted Campaigns

- Automatically subscribe each group to content tailored to their needs (e.g. HNW tax strategies, wealth transfer planning)
- Set auto-enroll rules so any new contact matching those filters joins the campaign instantly

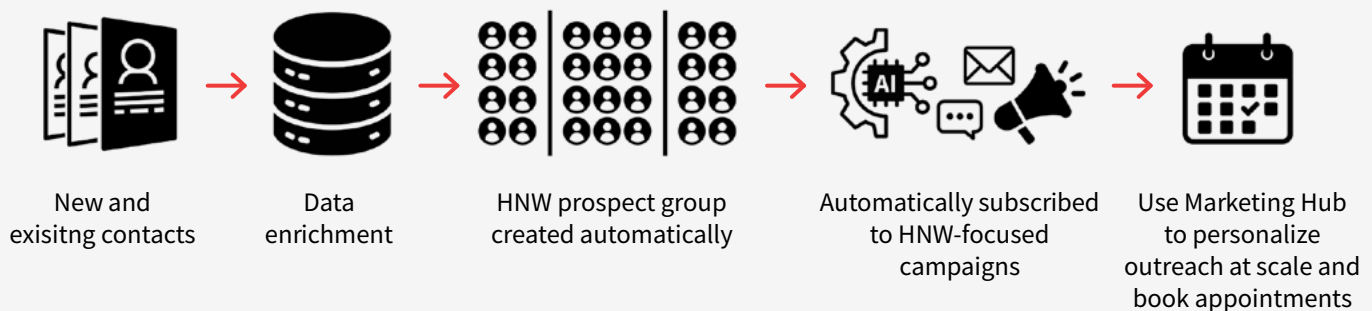
### 4. Let the Content Work—But Watch the Signals

- Share valuable, relevant campaigns without hard selling
- Use Snappy Kraken's Marketing Hub to see who's opening, clicking, visiting landing pages, and showing real interest

### 5. Prioritize Personal Follow-Up with Hot Prospects

- Take action on Marketing Hub insights to trigger alerts or outreach tasks
- Send a personal message, make a call, or schedule a 1:1 meeting at the right moment

**Complete HNW Marketing Journey:** *Achieve better results with strategic and focused campaigns*



## Why This Works

- **It's targeted:** You're focusing on the right people
- **It's timely:** You're catching them when interest is high
- **It's automated:** The system runs without constant input
- **It's scalable:** It works whether you're a solo advisor or a large firm

The firms winning with HNW marketing aren't just great at messaging—they're great at building *momentum*. This system creates that momentum, turning visibility into action and interest into revenue.

**Key takeaway:** You don't need to chase high-value clients. You need a system that draws them in, qualifies them quietly, and prompts action at the right time.

# Retaining & Expanding High-Value Relationships

Winning a high-net-worth client is a major achievement—but it's only the beginning.

Affluent clients expect more. More personalization. More proactive communication. More strategic thinking. And more reasons to trust that you're the advisor who can help them—and their family—navigate life's biggest financial moments.

The good news? When you deliver on those expectations, the rewards are just as significant: higher retention, deeper relationships, and warm referrals to others in their circle.

## Consistency Builds Confidence

HNW clients don't just want service when they ask for it. They want to feel like you're thinking about them—even when they're not in the room.

That's where proactive, consistent communication makes the difference. And it's not just about frequency—it's about relevance.

The best firms use automated marketing to stay in touch without losing the human touch:

- Personalized email campaigns that reflect the client's life stage, goals, or business
- Timely insights around tax law changes, market volatility, or planning strategies
- Event invites or content that prompts conversations with family members or COIs
- Regular check-ins triggered by activity, milestones, or engagement

The result? Clients feel seen, supported, and confident that they chose the right advisor.



### Exclusive & Personalized Experiences

Luxury Travel and Hospitality  
High-End Events and Social Gatherings



### Financial Services & Investments

Innovative Financial Products  
Tax and Estate Planning  
Holistic Wealth Management



### Luxury Products & Brands

High Quality and Prestige Goods  
Custom and Bespoke Items



### Health & Wellness

Premium Healthcare Services  
Fitness and Well-being



### Real Estate & Property

Investing for Value Appreciation  
Collectibles  
Assets that Accompany Prestige/Exclusivity



### Philanthropy & Social Impact

Charitable Giving  
Sustainable and Ethical Investments



## Scale Your Service Without Sacrificing Quality

Most advisors can't manually deliver white-glove service to every single client, every week. That's why smart automation matters. But automation alone isn't enough—you also need to align your client experience with what affluent clients expect.

High-net-worth individuals typically look for:

- **Expertise and trust** – Credentials, experience, and transparency in performance
- **Personalization** – Solutions tailored to their specific financial goals and preferences
- **Proactive communication** – Frequent, clear updates that anticipate questions before they're asked
- **Exclusive value** – Access to premium services, events, or networks that feel curated and special
- **Tech-enhanced service** – Tools that streamline interactions and make working with your firm easy and impressive

With the right system in place, you can deliver on these expectations—at scale:

- Send onboarding campaigns that guide new clients and set expectations
- Deliver curated content streams based on wealth stage, profession, or financial goals
- Monitor engagement and automatically surface clients who may need a touchpoint
- Keep your firm top-of-mind between meetings—without adding work to your plate

When you combine modern automation with HNW-specific expectations, you're not just scaling your service—you're enhancing it in a way that deepens trust and increases retention.

*Snappy Kraken includes automated content campaigns, personalized drip series, and AI-powered alerts to help you deepen relationships at scale.*

## Client Events: Relationship-Building With Referral Potential

Affluent clients don't want to be sold to—but they do want to be part of something meaningful, memorable, and aligned with their lifestyle and values. That's where high-quality, relationship-focused events shine.

To attract and engage affluent clients, plan events that reflect their interests and priorities:

- **Luxury travel & hospitality** – Dream vacation showcases with travel partners
- **Tax & estate planning** – Expert panels or annual strategy sessions
- **Prestige goods** – Private shopping excursions with limo service
- **Premium wellness** – Invite-only events with trainers, chefs, or medical specialists
- **Art & collectibles** – Gallery receptions, auctions, or private viewings
- **Exclusivity & experiences** – Exotic car test drive events, symphony under the stars
- **Charitable giving** – Fundraisers that connect personal values with community impact

## Private Symphony Under the Stars

- Hire a symphony (\$5-\$10k)
- Provide 50 HNW clients with two tickets - one for themselves and one for a guest
- Snacks and drinks optional
- People bring their own chairs/blankets
- Require advanced registration for lead capture

100 Exclusive Leads for  
\$50-\$100 Per Lead



## Charity Events

- Select your cause, and an activity people will pay for
- Negotiate reduced rates, charge standard price, give difference to charity
- Ask businesses to donate items for charity auction
- Follow up with all attendees

**Pro Tip:**  
Hire a photographer. Post the photos to social media and tag attendees

Unlimited Leads  
\$0 Per Lead

Real event examples

## Why These Events Work

- Strengthen emotional connection and loyalty with existing clients
- Create natural referral opportunities—every invite encourages guests to bring someone they trust
- Reinforce your firm's positioning as a premium, connected, and thoughtful partner
- Build brand equity through photo and content assets you can repurpose across channels

**Pro Tip |** Don't just host the event—market it well and follow up intentionally. Snappy Kraken's platform includes fully customizable event promotion campaigns that handle registration, reminders, social sharing, and follow-up—so you can focus on relationships, not logistics.

**Key takeaway:** The advisors who grow with high-net-worth clients don't just manage portfolios—they manage relationships. That means building trust over time, delivering value consistently, and making every client feel like your most important one.

## \$17M Client Win from Targeted HNW Marketing



*“Snappy Kraken does a great job of getting people’s attention—they helped me win a client that is approximately \$150,000 of recurring revenue to me for every year that I keep this relationship. With all of the recent acquisition, which Snappy Kraken has contributed to, I’ll soon be able to expand by taking on new partners and employees to kick growth to an even greater level.”*

*— John Suarez, MBA, President & Founder, Peristyle Private Wealth Planner*

### What happened:

- John’s firm specialized in working with Ferrari owners, but his marketing didn’t reflect that niche
- Snappy Kraken helped with a brand refresh, new website, and targeted campaigns tailored to high-net-worth individuals
- The result? He won a \$17M client worth \$150K/year—and attributed that success to the system

### Why it matters:

- Shows how niche positioning and consistent marketing drive real ROI
- Reinforces that the right message attracts the right clients
- Shows how important your content and branding is to connect with this market

## Section 4

# Bringing It All Together

Attracting, winning, and retaining high-net-worth clients isn’t about doing one thing—it’s about building a system where everything works together:

- Your **content** signals expertise and relevance to the right audience
- Your **CRM** is enriched and segmented to reveal your best opportunities
- Your **campaigns** are automated, but still personal
- Your **outreach** is timely, based on real signals
- Your **relationships** are deepened through value, consistency, and trust

It’s not about luck. It’s about clarity, visibility, and the right tools to make it all run smoothly—so you can focus on the conversations and relationships that matter most.

## The Opportunity You Might Be Missing

The truth is, most advisors are already connected to affluent prospects. But without the right strategy and systems in place, those prospects go cold. Or worse—they *end up with a competitor who's built their marketing for this exact audience.*

This guide has shown you what works:

- The type of content HNW individuals respond to
- Where your best leads are likely hiding
- How to prioritize the right people using data
- What a complete system looks like from click to client
- And how to deliver a client experience that retains and multiplies value

## Next Steps | Build Your Own HNW Marketing System

If you want to start implementing what you've learned here, here's where to begin:

- **Audit your current list – Are you enriching contact data? How many HNW individuals are on your prospect list that you aren't aware of?**
- **Review your content – Are you speaking to the needs of high-value individuals? Or sending generic messages to everyone?**
- **Evaluate your systems – Do you have automated workflows in place to support each stage of the client journey?**

If the answer to any of those is “not yet”—you're not alone. And you don't have to build it all from scratch.

**Snappy Kraken gives advisors and firms everything they need to attract, win, and retain high-net-worth clients—automatically.**

- **Prebuilt campaigns crafted for affluent audiences**
- **Data enrichment, segmentation, and targeting tools**
- **AI-powered visibility and outreach opportunities**
- **Scalable onboarding and retention workflows**
- **A team of experts ready to help you get started**

### Want to See It in Action?

Get a behind-the-scenes look at how advisors are using Snappy Kraken to land \$1M+ clients, turn their CRM into a growth engine, and consistently stay top-of-mind with the people who matter most.

**BOOK A DEMO**

*No pressure. Just a walkthrough of what this looks like in real life.*

**Final takeaway:** Affluent marketing doesn't have to be complicated. But it does need to be strategic, consistent, and built for the long game. You don't need to chase opportunity. You need to become the advisor that high-value clients naturally gravitate toward.

Let's help you get there.