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“Snappy Kraken creates timely, compliant, and easy-to-understand marketing emails, delivering complex financial information in a lively format that is clickable, not skippable. I get high-quality referrals without spending 20 hours a week on marketing.”

Mike Acevedo

Certified Financial Planner™

Mike Acevedo Financial Planning

How **Mike Acevedo** Added

\$2 MILLION IN AUM

with Snappy Kraken's

Done-For-You

Marketing Program



\$2-3 million

new AUM



3-5x

more email newsletter
responses



\$30,000

new ARR in 12 months

For over 10 years, [Mike Acevedo Financial Planning](#) has provided advice on retirement planning, tax management, pension and DROP analysis, portfolio risk, life insurance, and more to first responders in Southern California.

HIGHLIGHTS

Challenges

Finding more clients through email marketing

Creating valuable, sharable content that resonates

Creating content that reflects his investment philosophy and brand

Challenges

Finding more clients through consistent, authentic email marketing

Mike Acevedo, owner of Mike Acevedo Financial Planning, didn't have time to create the email marketing campaigns he needed to drive new business.

"If I had to write the content, send the content, and do all that stuff, that's a full-time marketing job," says Mike. "It's just not what I do or what I'm comfortable with."

For a while, he tried using different vendors to create and deploy marketing content for him, but he was never happy with what they produced.

"I probably used two or three companies, and none of them were memorable. The content wasn't resonating with my clientele," he says.

He admits that the content these companies created and shared with his clients and prospects was uninspiring—even to him.

"I looked at it and thought, good enough, and then checked off the box and moved on. But even I didn't want to open it. I was falling asleep by the time I got through the first paragraph," jokes Mike.

Engagement with these email newsletters was poor as a result. Often, Mike received no responses at all.

Finding a marketing agency to partner with was particularly challenging given the niche client base of Mike's firm. One-size-fits-all content was a poor fit for his clientele.

"My clients are blue-collar workers with \$500,000 in savings and generous public-sector pensions. They aren't interested in regurgitated headlines about the Dow Jones Index and S&P 500," says Mike.

At one point, Mike considered hiring a ghostwriter who could more accurately capture and convey his investment philosophy and brand. But that arrangement would still involve a lot of his time.

"It felt like it was a great idea until I realized I'd still have to format everything manually, upload it to an email platform, and schedule and send it out myself," adds Mike.



What Mike needed was a partner who would work closely with him to launch marketing campaigns that resonated with his audience, freeing up his time to focus on serving his clients.

Then, Mike noticed that he would always open and read the marketing emails he received from Snappy Kraken. And knew he'd found the solution to his problem.

"Their newsletter was colorful and catchy. It was informative and written at a level that my clients could understand. I wanted to read it and share it, and I was confident my clients would feel the same way," says Mike.

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HIGHLIGHTS

Solution

Snappy Kraken's Freedom 360 "done-for-you" marketing solution

Flexibility to create his own content when desired

Dedicated customer support specialist

Website optimized and campaigns ready in less than a month

Solution

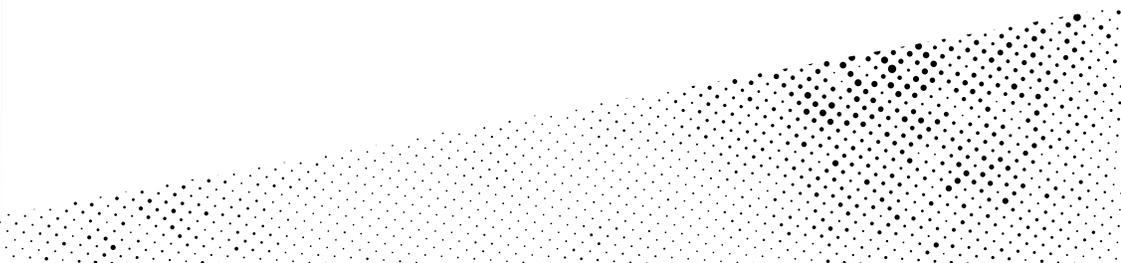
Freedom360: A "done-for-you" marketing solution

Mike took his marketing to the next level with [Freedom360](#): Snappy Kraken's fully-managed marketing service. With Freedom360, everything is done for Mike—from website SEO and new content creation, to marketing reporting and optimization.

Mike no longer has to worry about writing, uploading, scheduling, and delivering his marketing emails, yet he still retains control and approval over all content and campaigns.

Flexibility to create his own content

While Freedom360 is a hands-off solution, Mike can still contribute his own content when he feels inspired.





"The ready-made content was excellent, and the ability to slip in my own writing sweetened the deal. Sure, I prefer to let someone else do the work, but sometimes I need to add my own two cents, which makes Snappy Kraken a no-brainer," says Mike.

Dedicated customer support specialist

Early on, Snappy Kraken assigned Mike a customer support specialist who walked Mike through Snappy Kraken's onboarding process. The same specialist continues to support Mike to this day.

Mike appreciates the personalized nature of the relationship, which is in stark contrast to previous vendors he's worked with.

"I don't have to submit a support ticket and wait for someone to get back to me who doesn't understand what I'm looking for," says Mike.

Instead, Mike simply reaches out to his Snappy Kraken specialist when he has a question or needs help. And his specialist proactively reaches out to Mike when he spots new opportunities.

"He's always available if I need to make a change. I can ask him to reword the ending of an email to better reflect my clients' needs. He alerts me if there's breaking financial news that requires an unscheduled email and helps me maintain the website. He does so much, I feel like I have a full-time marketing manager on staff," enthuses Mike.

Ready to launch in less than a month

The Snappy Kraken team built and deployed an email marketing campaign and search-optimized website for Mike in less than a month—including the process of confirming regulatory compliance.

"It took three weeks to set up the website, draft the first batch of emails, and submit everything for regulatory compliance. A few days later, we launched an initial email campaign. Snappy Kraken did everything for me. All I had to do was wait for the results to come in," says Mike

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Results

\$2 million in new assets under management

When Mike's email newsletter subscribers started to engage with and respond to his content, Mike was ecstatic.

"Sometimes, it's just a thank you for sending an article. Often, it's a question about my financial services. It feels so natural. It's like I'm having a conversation with a client, not responding to a marketing email," says Mike.

Today, Mike commonly gets three to five responses for every email newsletter he sends out. That's **3 to 5x more email responses** than he received before.

One marketing email in particular was a huge success. It was a simple email letting his subscribers know that he was taking on new clients. It was so simple, Mike didn't give it much thought.

"I'd done these before with little success, so I wasn't even really checking to see if it was working or not," says Mike.

Unbeknownst to Mike, one of his subscribers forwarded his email to two of their contacts and those brand new referrals became clients.

That single email added nearly **\$2 million to Mike's assets under management**, and with a few other accounts coming in throughout the year, Mike **generated \$30,000 in annual recurring revenues that can be directly attributed to Snappy Kraken**.

"Snappy Kraken paid for itself with that single email," says Mike.

Today, Mike is excited to deepen his relationship with Snappy Kraken even more by adding video content to his marketing mix.

"Snappy Kraken provides the scripts, and all I have to do is hit record and read. That's the direction I'm going, and this is the only platform that offers it," says Mike.

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"Snappy Kraken paid for itself with that single email."

HIGHLIGHTS

Results

\$2 million in new AUM from one email campaign

3-5x more email newsletter responses

\$30,000 in recurring annual fees

**BUILD STRONGER RELATIONSHIPS
WITH CLIENTS AND BOOK MORE
APPOINTMENTS WITH PROSPECTS.
WITHOUT SPENDING ALL YOUR TIME
TRYING TO BE A MARKETER.**

Learn more about Freedom360.

[BOOK A CONSULT](#)

