



KYLE DEBRUHL

"THE FAMILY OFFICE MINDSET" CASE STUDY

"THE FAMILY OFFICE MINDSET" BOOK LAUNCH

As a Senior Copywriter, I was tasked with increasing lead generation for Malloy Wealth Management (MWM) through a thought leadership campaign.

Challenge:

MWM was looking to expand their client base and attract new high-net-worth individuals and families. They recognized that creating thought leadership content would be an effective way to establish their expertise and generate leads.

Solution:

In order to address this challenge, I partnered with the marketing director and a consultant from MWM to create a comprehensive marketing strategy. Together, we conducted research into wealth management best practices and developed the concept for a book called "The Family Office Mindset." The book was designed to educate potential clients about managing family wealth and generational wealth. I was responsible for writing the book, working with the existing Creative Director on formatting, and form-gating each chapter on the MWM website. This allowed MWM to generate leads for their sales representatives to follow-up on.

Results:

The book was written in just three months and immediately generated leads for MWM. The form-gated chapters on the website effectively captured the interest of potential clients and provided a valuable resource for the sales team to follow-up on. Additionally, the book helped MWM establish themselves as thought leaders in the wealth management industry.

Conclusion:

Through the development and launch of "The Family Office Mindset," I was able to effectively address the challenge that MWM was facing in generating leads. By conducting research, creating a comprehensive marketing strategy, and form-gating the book on the MWM website, we were able to increase lead generation for the organization and establish MWM as thought leaders in the wealth management industry. This project demonstrates my ability to develop and implement effective marketing strategies that drive business results.

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