

RIA Digital Marketing Strategies



PRESENTS

**Why We Are At Peak ROI For Prospect and
Advisor Digital Lead Generation**

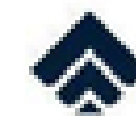
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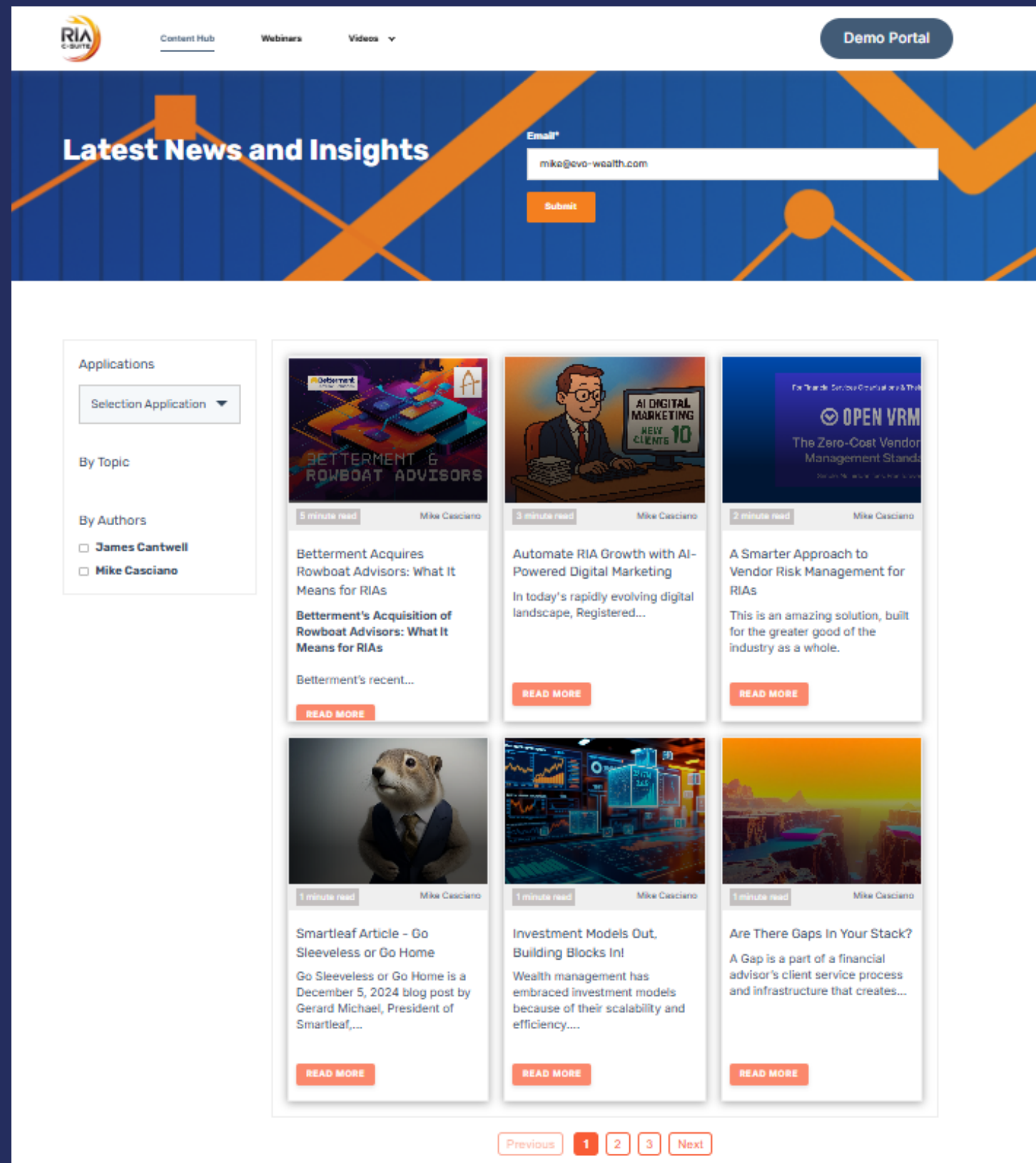
VastAdvisor



wealthfeed



RIA Catalyst



What is RIA C-Suite?

RIA C-Suite is an education-based website built specifically for RIA advisors and leadership. It was created to fill one of the largest unmet needs in wealth management - understanding what is possible with emerging technology.

It features articles, short video, webinars, strategy guides, and an interactive demo portal. The key difference is that the content is simple, easy to understand, and operationally focused.

Technology is improving exponentially, yet the ability for RIAs to implement and adapt is still linear.

Digital Marketing is at Peak ROI Today

TRADITIONAL GROWTH IS SLOWING

Cerulli reports referrals are less than 30% of new assets - down from 60% a decade ago

SmartAsset states the average client acquisition costs (CAC) are over \$3,000 and rising

WHY TODAY

Only 28% of RIAs implement a digital strategy

As more RIAs participate, ROI will decrease

RIAs with a digital strategy grow at 2-3x industry

SCALE AND COST

Qualified, actionable leads at a fraction of the cost

Direct digital ads are pennies per impression

Technology automates the entire process

GET STARTED IN DAYS

Identify targets and obtain email addresses

Outsource or insource strategy management

Develop content, messaging, and activate ads

Cerulli Associates, U.S. Advisor Metrics 2024: The Race to Scale and the Shifting Advisor Growth Playbook (Dec 2024)

SmartAsset, Advisor Marketing Benchmark Report 2024: Lead Generation and ROI in the RIA Channel.

McKinsey & Co., U.S. Wealth Management Amid Market Turbulence (2024)

Broadridge, 2025 Advisor Marketing Benchmark Report

An Integrated Ecosystem for Modern RIA Growth

RIA C-Suite identifies best-in-class options that help advisors identify, attract, and convert ideal clients. Each solution plays a distinct but connected role in creating a seamless growth engine.



WealthFeed
Prospect Target Identification and Data
Money-in-Motion Events
Ideal Client Characteristics and Geography Searches



RIA Catalyst
Advisor Target Identification and Data
Characteristics and Contact Information
Custom Predictive Scoring for Best-Fit Targets



FinHive Solutions
Outsourced, Managed Digital Marketing Solution
Develop and Execute Targeted Media, Nurturing and Lead
Generation Campaigns



VastAdvisor
Insourced, Intelligence and Optimization Solution
Centralize data, automate campaigns, and continuously
optimize growth performance



Technology Delivers Highly Automated Organic and Inorganic Growth at Low Cost

By combining AI-powered, emerging technologies, RIAs can easily and cost-efficiently identify, nurture, and convert prospects and targets into qualified leads, clients, and acquisitions.

Prospect Data

Create a target list of ideal HNW client prospects based on Location, Income, Net Worth, Company, Job Title, Alma Mater and Catalyst Events.

POWERED BY



Digital Strategy

FinHive Solutions manages digital advertising only to targeted prospects. It nurtures interested prospects until they become qualified leads for engagement.

POWERED BY



Advisor Data

Find and engage the best-fit RIA acquisition and lift-out targets with AI-powered intelligence to identify advisors and firms most likely to make a change.

POWERED BY



Growth OS

VastAdvisor is the first AI powered growth operating system that manages everything. From data, AEO, nurturing, content creation, scheduling, KPIs, and even compliance.

POWERED BY

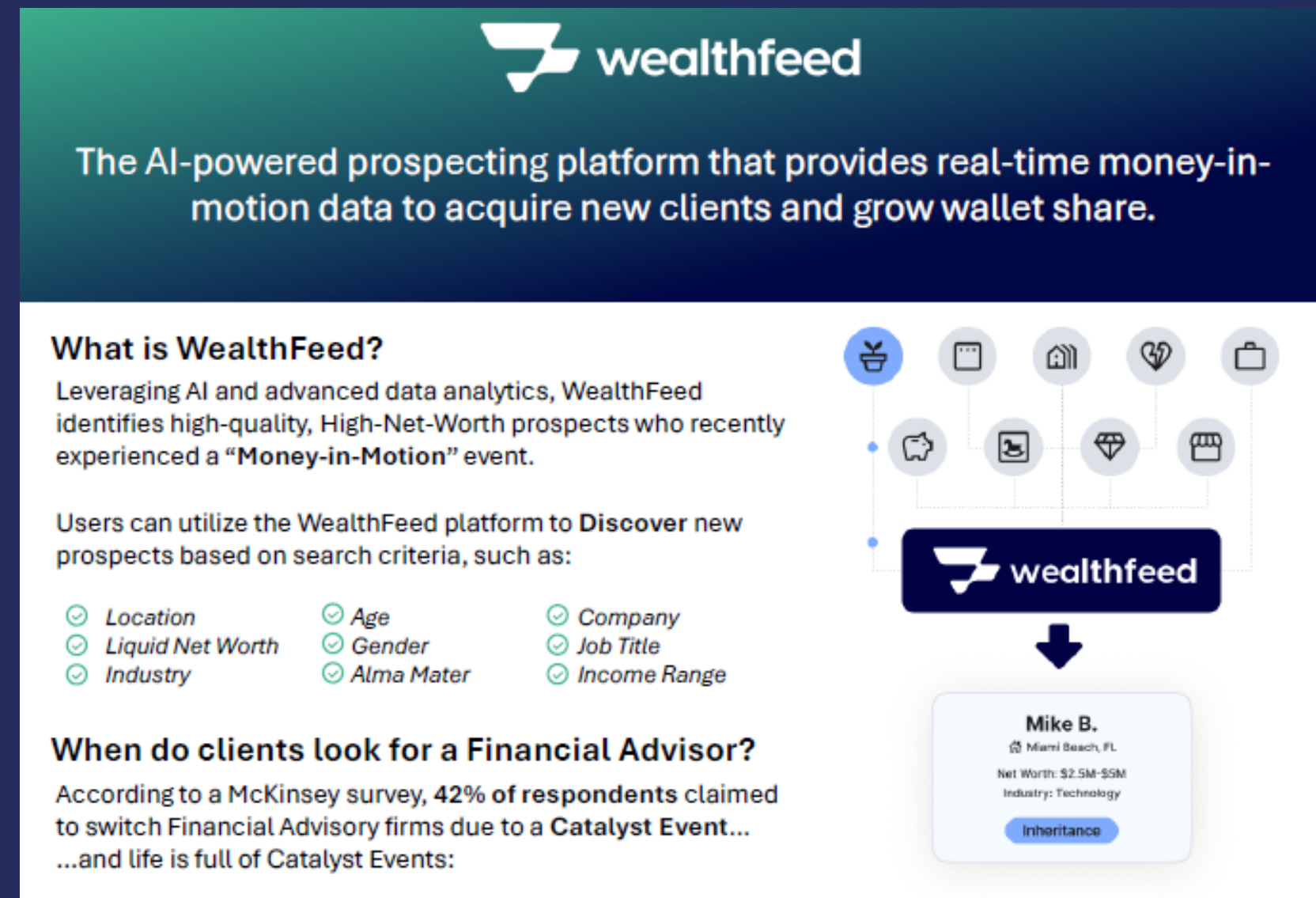


Wealthfeed

Client Prospect Targeting Database



Emerging Technology that scrapes and aggregates client and prospect data. Leveraging AI and data analytics, it allows wealth firms to identify prospects using characteristics and “Money-in-Motion” events. This creates a verified, high-intent target list for digital marketing campaigns.



wealthfeed

The AI-powered prospecting platform that provides real-time money-in-motion data to acquire new clients and grow wallet share.

What is WealthFeed?

Leveraging AI and advanced data analytics, WealthFeed identifies high-quality, High-Net-Worth prospects who recently experienced a “Money-in-Motion” event.

Users can utilize the WealthFeed platform to **Discover** new prospects based on search criteria, such as:

- Location
- Liquid Net Worth
- Industry
- Age
- Gender
- Alma Mater
- Company
- Job Title
- Income Range

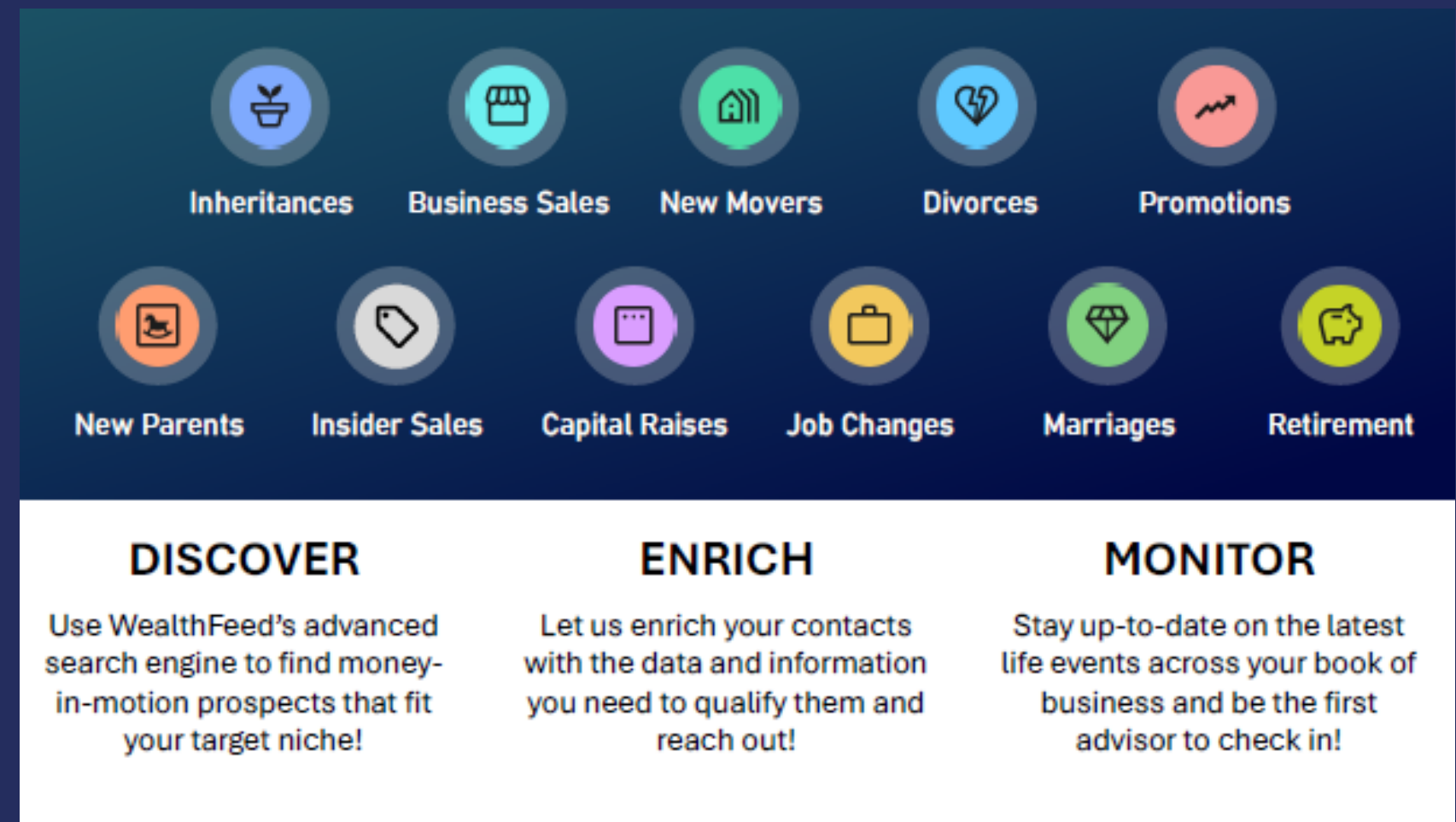
When do clients look for a Financial Advisor?

According to a McKinsey survey, **42% of respondents** claimed to switch Financial Advisory firms due to a **Catalyst Event**...
...and life is full of Catalyst Events:



The diagram shows icons for various life events: Inheritances, Business Sales, New Movers, Divorces, Promotions, New Parents, Insider Sales, Capital Raises, Job Changes, Marriages, and Retirement. These icons are connected by lines to a central 'wealthfeed' box, which then points down to a prospect profile for Mike B.

Mike B.
Miami Beach, FL
Net Worth: \$2.5M-\$5M
Industry: Technology
Inheritance



The diagram illustrates the Wealthfeed process flow, starting with a grid of 11 life events: Inheritances, Business Sales, New Movers, Divorces, Promotions, New Parents, Insider Sales, Capital Raises, Job Changes, Marriages, and Retirement. Below this grid, the process is divided into three stages: DISCOVER, ENRICH, and MONITOR.

DISCOVER

Use WealthFeed’s advanced search engine to find money-in-motion prospects that fit your target niche!

ENRICH

Let us enrich your contacts with the data and information you need to qualify them and reach out!

MONITOR

Stay up-to-date on the latest life events across your book of business and be the first advisor to check in!

To learn more about Wealthfeed click the button to go to their website

[LEARN MORE](#)



RIA Catalyst

Advisor Acquisition Database



AI-powered data scraping and aggregation platform that collects everything from ADVs and firm characteristics to advisor information and contact details. Easily score and source RIA acquisition targets with predictive modeling. If inorganic growth is a priority, improve the odds of finding the right advisors and firms at the right time.

Meet RIA Catalyst

The AI-powered deal sourcing and diligence platform for modern M&A teams

We augment M&A teams who spend hundreds of hours:

Sifting through fragmented data sources

Verifying potential targets before even picking up the phone

Completing manual, error-prone calculations

To reach their maximum potential by:

Screening **100%** of the RIA market in seconds

Sourcing advisors w/o paying **5-10%** trailing 1-year revenue

Cutting down RIA target evaluation time by **4X**

We provide the expertise of a seasoned M&A professional with the scale of a data platform.

	RIA Catalyst	Competitors Fintrx, Discovery Data, AdvizorPro
Firm and advisor profiles	✓	✓
Market screening and prospect list creation	✓	✓
M&A specific screening filters such as owner age, profitability, productivity, and custodian.	✓	✗
Historical filings and acquisitions	✓	✗
Unlimited exports	✓	✗
Predictive acquisition score and custom scoring models	✓	✗

To learn more about RIA Catalyst click the button to go to their website

LEARN MORE



FinHive Solutions

Outsourced/ Managed Lead Gen Platform Digital Media Placement



Managed outsourced prospect nurturing platform and digital media placement to create targeted, turnkey qualified leads. Access an enterprise digital marketing platform on a subscription basis to limit cost and maximize efficiency.

Our Approach

FinHive takes a comprehensive approach that combines thorough market research, innovative technology, and strategic, data-driven insights. We focus on intentional audience segmentation, effective branding, advanced CRM systems, and tailored content creation. Our goal is to develop custom solutions specifically designed to strengthen and enhance your market position.

Service Overview & Platform Pricing

Meet Lauren

Lauren has extensive experience in financial services sales and distribution, particularly within the ETF industry, having worked within sales teams at various financial institutions. Her expertise in advisor relationship management was developed during her time at ROBO Global, Global X, State Street, and First Trust. She excels in product marketing strategy, prospect profiling and audience segmentation.

Meet Erin

Erin is a skilled marketing strategist with expertise in digital marketing, CRM implementation, and channel strategy. She has a proven track record in both corporate and entrepreneurial environments, consistently delivering effective marketing solutions. Erin excels in crafting strategies, developing projects, and analyzing market trends, which contribute to brand growth and operational efficiency for her clients.

VastAdvisor

The Intelligence Layer That Connects the Stack



VastAdvisor integrates with the full RIA C-Suite suite to create a powerful, closed-loop growth system. It serves as the central intelligence hub that connects every component of your growth strategy.

- Incorporate prospect data sets
- Activate multi-channel digital marketing campaigns
- Measure performance and attribution across every touchpoint
- Feed insights back into each layer for smarter targeting



VastAdvisor Growth OS sits at the center, orchestrating continuous improvement across all four stages.

VastAdvisor

Plug-and-Play Growth Intelligence for Every Firm Size



VastAdvisor provides wealth firms with immediate access to an AI-powered Growth OS without complex implementation. Get started quickly and scale at your own pace.



Immediate Access

AI-powered Growth OS without complex implementation



Unified Dashboard

Complete visibility across prospecting, marketing, and compliance



Configurable Workflows

Map seamlessly to each partner platform

DIRECT DIGITAL ADVERTISING: MAXIMIZE YOUR PAID MEDIA SPEND WITH PRECISION TARGETING

Target the Right Prospects, Every Time

With direct digital advertising, you can reach the specific targets you want, no matter where they are online. Instead of casting a wide net, you only spend on ads seen by prospects who fit your target profile.

More Efficient Use of Your Budget

Unlike broad platforms like Yahoo Finance, where a direct ad buy can start at \$50,000 and reaches a general audience, our platform ensures your ads are seen only by the prospects who matter most to your business. This means you avoid wasted impressions and unnecessary costs.

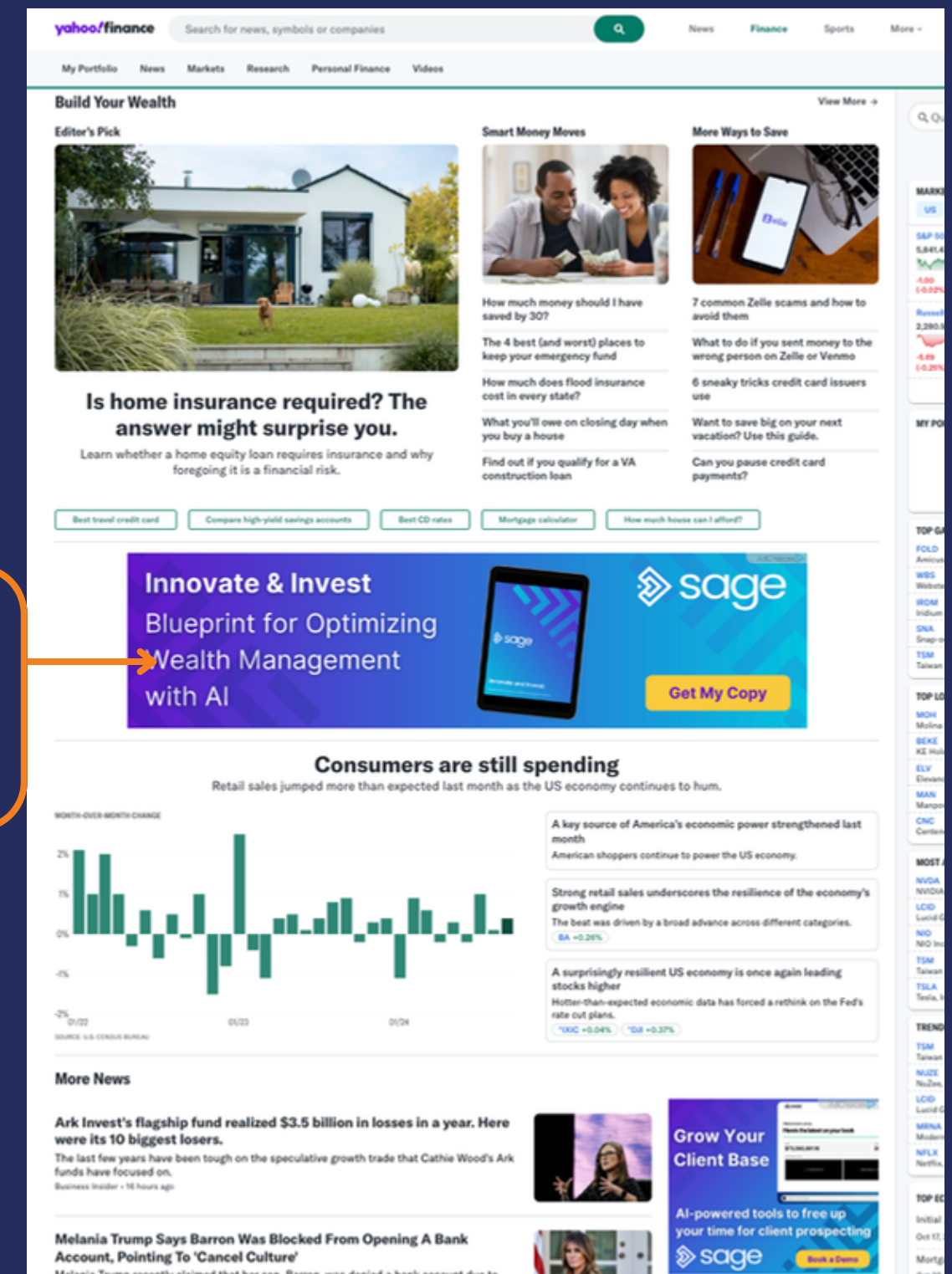
Flexibility & Control

Control your spending and adjust your targeting parameters in near real time, ensuring that your ad dollars are used efficiently. Get the right message to the right people at the right time.

Data-Driven Insights

Leverage detailed performance metrics, allowing you to track engagement, measure ROI, and refine your strategy. See exactly which people and firms are interacting with your ads and visiting your website.

This impression on the homepage of Yahoo Finance cost 2 pennies



Solution Cost - Way Less Than You Expect

Pricing is unbelievably efficient because it is powered by technology. Wealthfeed and RIA Catalyst leverage AI and data analytics to assemble publicly available information. The digital marketing platform can be outsourced to FinHive Solutions or managed internally by the firm and advisors with VastAdvisor. Evaluate which solutions would be the best fit for your RIA.

The client acquisition costs can be reduced by over 90% compared to traditional referral services and lead gen platforms. The cost of waiting may be tremendous regret. This opportunity for growth is at peak ROI right now. Over time more firms will implement a direct digital marketing strategy because it works and drive down efficiency.

To determine which solutions are of interest and schedule an introduction, email Mike Casciano, mike@riacsuite.com or click the schedule a meeting button on the last page.



Mike Casciano
President
RIA C-Suite and EVO Wealth Consulting

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www.riacsuite.com

www.evo-wealth.com

Mike has spent over twenty years in the wealth industry. He began his career as a financial advisor. For over 15 years, he held many roles at BlackRock ranging from wholesaler, portfolio consultant, wealth tech joint venture platforms, and advisor training. At Principal, Mike created a joint venture to distribute Principal models and custom indexes to RIAs through third-party portfolio overlay management providers. He also built a proprietary risk analytics platform and established their portfolio consulting business for advisors. In 2023 he started EVO Wealth Consulting to help RIAs implement emerging technology and process enhancement. In 2024 he launched RIA C-Suite to provide educational content for the industry focused on emerging tech.

Connecting Wealth and Tech Through Data Led Digital Marketing

[Schedule a Meeting Here](#)