

## intelliflo's first-ever omnichannel digital marketing campaign

intelliflo dominates the UK with over 50% market share in financial advice technology—yet just two years ago, it was virtually unheard of in the U.S. Acquired by Invesco in 2018, intelliflo is now on a mission to transform access to financial advice through intuitive, scalable tech built for modern advisors.

The U.S. marketing team was strategically assembled under my leadership in mid-2022 with the understanding that the U.S. is a critical growth market for intelliflo's future. The marketing team quickly got to work, transforming a previously stagnant function and modernizing the marketing organization into an efficient lead-generating machine.

Our first-ever **omnichannel marketing campaign** launched in Q1 2023 to introduce and elevate *intelliflo redblack*—our award-winning rebalancing and trading solution—in the competitive U.S. market.

Unlike traditional multi-channel efforts, this campaign was designed to deliver a **seamless, integrated experience**, making it easier for advisors to connect, engage, and act. But with low brand awareness and a crowded fintech landscape, we knew we couldn't rely on table-stakes tactics. Most competitors were selling speed. Our 40+ hours of market and persona research revealed a deeper truth: advisors didn't just want faster rebalancing—they wanted **scalability, simplicity, and peace of mind**. Many were still juggling spreadsheets or outdated systems, not because they wanted to, but because they hadn't seen a platform that truly helped them grow.

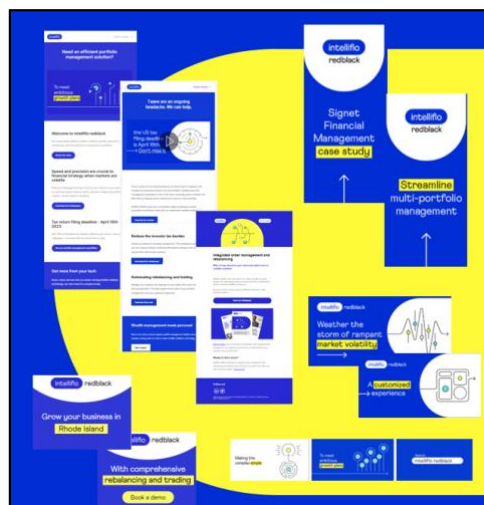
So we **repositioned intelliflo redblack** from a back-office utility to a **strategic growth partner**—one that helps advisors scale smarter, serve faster, and sleep easier. That insight fueled a bold new brand refresh and message architecture focused on education, relevance, and trust. The campaign launched across 15 channels—**12 of which had never been tested at intelliflo before**—and included over 400 creative assets tailored by persona, funnel stage, and channel. We also built **50+ new pieces of content** including workflow guides, ROI calculators, and thought leadership to support the full buyer journey. To extend our reach, we established **third-party partnerships** that allowed our lean team to scale impact without scaling headcount. This was more than a campaign—it was a full-scale market reintroduction. It redefined the category conversation and helped advisors reimagine what rebalancing could do for their business.

One partner told us our creative “didn't look like fintech—it looked like the future of advice.” The impact? A 25% YoY revenue jump in the U.S., a 3x lift in demo volume, and a meaningful shift in how the market talked about us: no longer as a back-end tool, but as a front-office accelerator for growth-minded firms.

The campaign led to significant full-funnel U.S. marketing-driven results for the business:

- **Explore:**
  - Impressions - 167% to plan
  - U.S. website visits - 354% to plan
  - U.S. LinkedIn follower growth - 220% growth YoY
- **Consider:**
  - U.S. marketing qualified leads - 129% to plan (500% year-over-year growth)
- **Decide:**
  - U.S. sales qualified leads - 119% to plan
  - 60%+ of closed-won deals were marketing-driven (typical B2B average is around 30%)

The team also spotted an opportunity to innovate using dynamic creative optimization (DCO) as part of the first-ever omnichannel campaign. Given we target advisory businesses/financial advisors with certain levels of assets under management (AUM), the team leveraged DCO ads for states and cities with the highest concentration of firms by AUM, leading to more pinpointed effort with



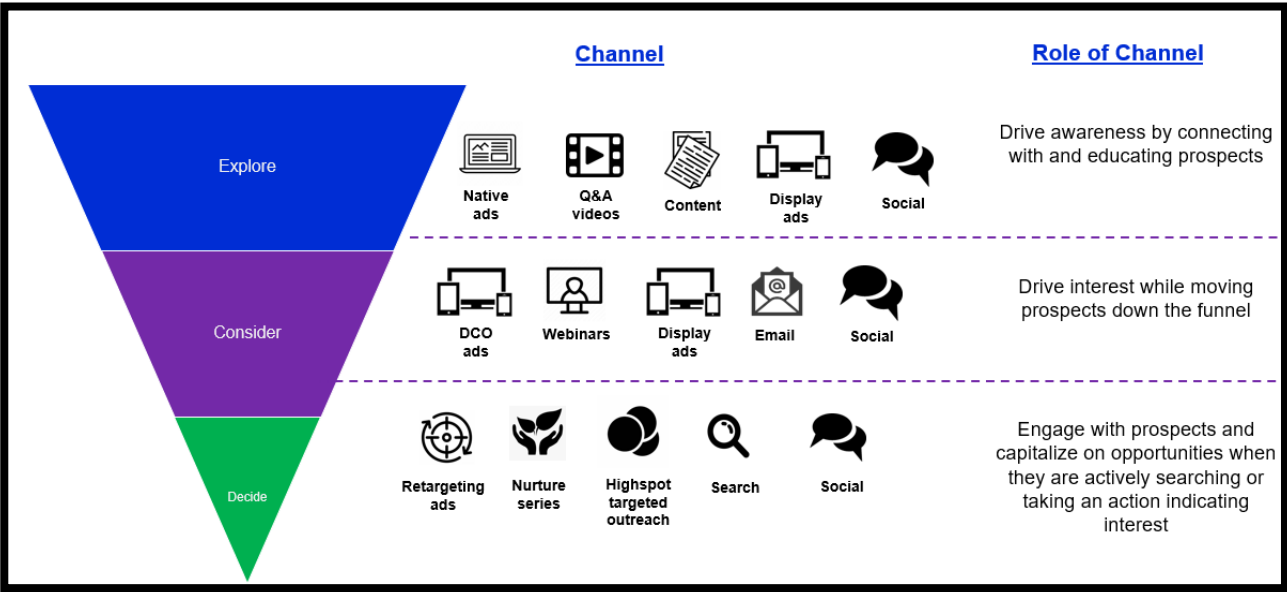
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less waste. DCO marketing uses technology to match the best-suited ad creative to the user based on specific criteria.

This campaign continued year-after-year with updated copy, optimizations, and learnings to make an even bigger impact!

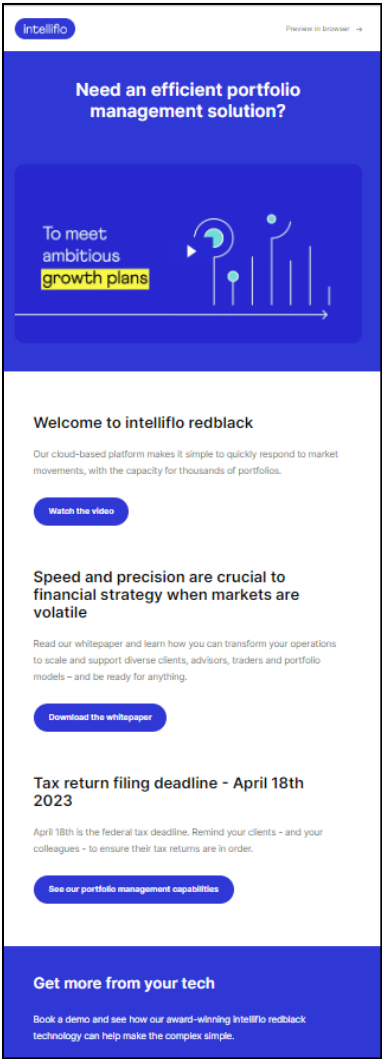
Channel strategy overview





Campaign demand gen email sample:

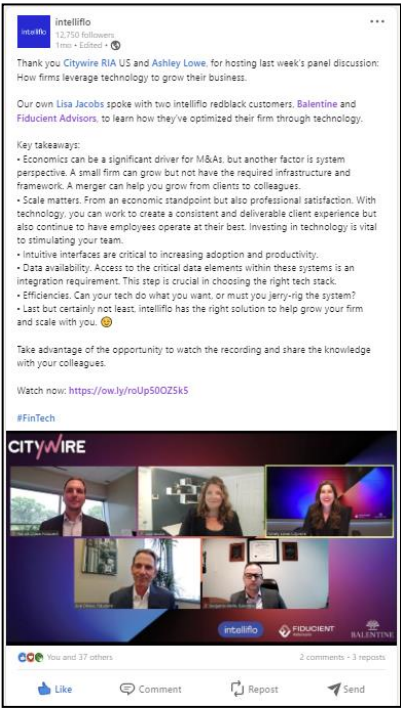
Subject line: Hello, intelliflo redblack



Organic social media post samples:

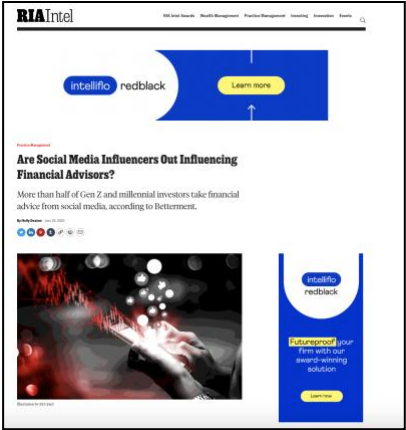
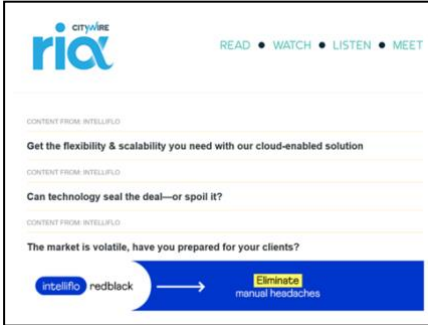


[https://www.linkedin.com/posts/intelliflo\\_delivering-value-intelliflo-redblack-activity-7086721884771291136-41xq?utm\\_source=share&utm\\_medium=member\\_desktop](https://www.linkedin.com/posts/intelliflo_delivering-value-intelliflo-redblack-activity-7086721884771291136-41xq?utm_source=share&utm_medium=member_desktop)



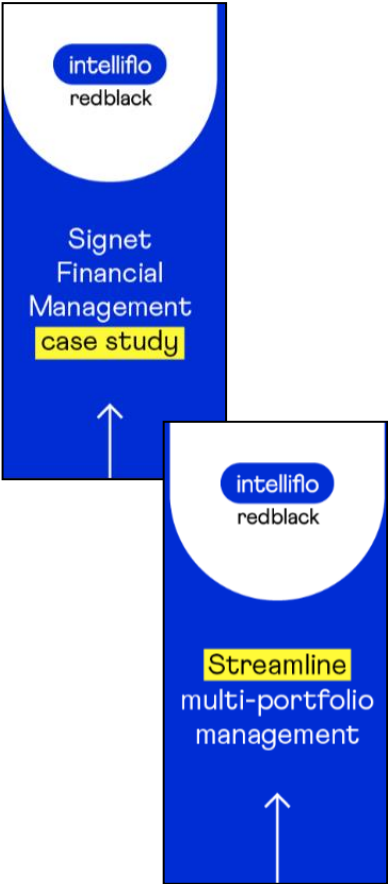
[https://www.linkedin.com/posts/intelliflo\\_fintech-activity-7079835849428717568-P9UN?utm\\_source=share&utm\\_medium=member\\_desktop](https://www.linkedin.com/posts/intelliflo_fintech-activity-7079835849428717568-P9UN?utm_source=share&utm_medium=member_desktop)

Third-party partner campaign samples:



LinkedIn awareness sample:

Display ad samples (static):



LinkedIn lead gen sample:



intelliflo

12,267 followers

Promoted

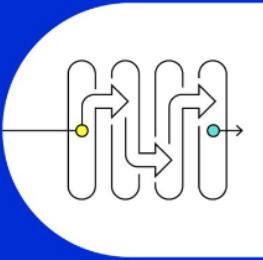
Enhance Portfolio performance in less time with Automated Rebalancing and Trade management.

Find out how intelliflo redblack (US) can free up your precious time by automating complex processes.

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Automate  
portfolio  
balancing



Seamless operations | intelliflo redblack

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12,267 followers

Promoted

By automating manual advisor functions, financial advisors are empowered to make tailored portfolios available to more clients.

This whitepaper examines more investor trends that are shaping the future of wealth management.

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Wealth  
management  
trends

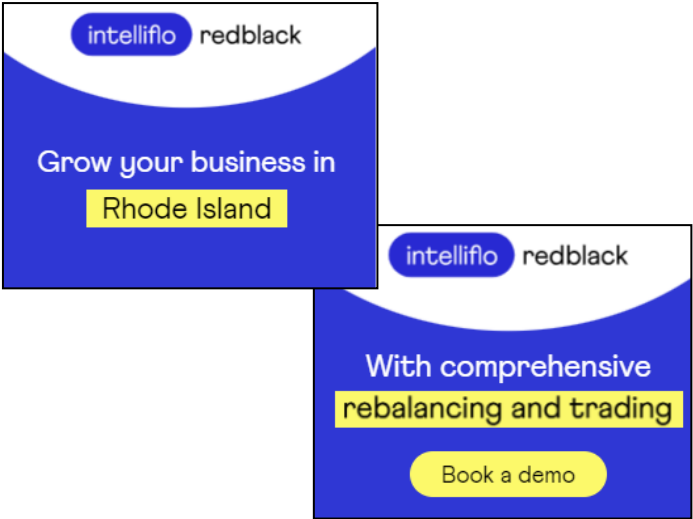


Client-centric technology | intelliflo redblack

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Animated DCO sample:

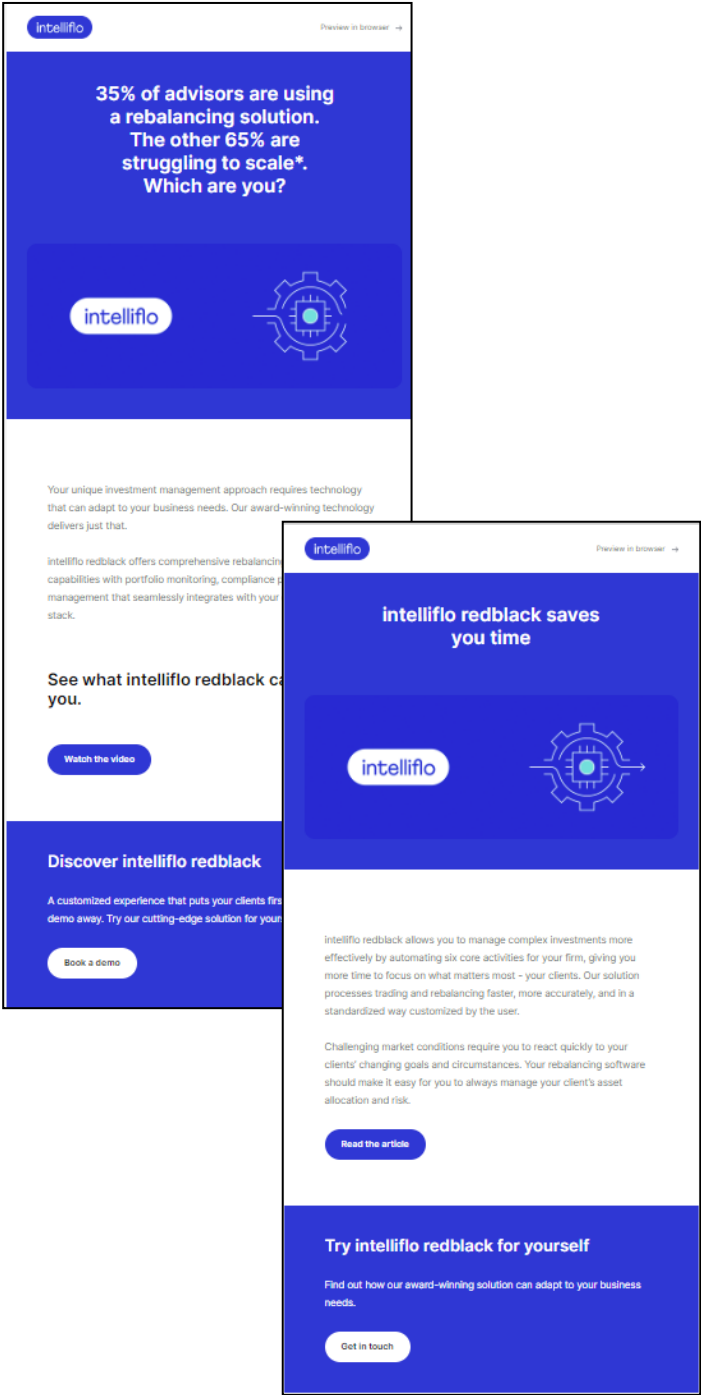


Infographic sample:



Nurture email series sample:

Six-series nurture email series targeting engaged leads



Content samples (articles, whitepapers, videos, etc.):

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# How rebalancing technology can streamline householding in a multi-custodian environment



A growing number of independent advisory firms with over \$500 mil are employing more than one custodian to offer additional options to their clients. Some experts assert that multiple custodians can provide more opportunities and allow them to serve a larger market share. However, rebalancing among multiple custodians like Fidelity, TD Ameritrade, Charles Schwab, and Pershing can become highly complicated—often at the household-level.

Some firms that work with a single custodian use spreadsheets for rebalancing. But with many firms opting to add a second custodian, acquired firm's custodians, having a data-driven rebalancing and trade can help simplify and streamline rebalancing, trading, order management, allocation across custodians and effectively manage client investment householding structure.

Here's how:

## Setting up models and asset location rules

Householding structures can become highly complex. With a wide variety of account types held across family members, with different tax character asset class restrictions, some managed and others under advisory, a spend significant time determining to which accounts to hold and trade. That's where model construction and asset location rules come into play.

By setting up a model at the household level and defining asset location based on taxability and trading, you can streamline rebalancing and automatically buying or selling assets in the appropriate accounts, in orders by custodian, and submitting the account allocations accordingly.

## Leveraging aggregated data

Data aggregation across custodians, holistic rebalancing, and integrity are vital to shift effectively to householding. This combination makes and straightforward to rebalance accounts and households to make cash requirements, legacy positions, tax considerations, and more value directed trades.

In addition, intelliflo's platform that can import data from multiple providers provides significant time savings by eliminating multiple systems high managing rebalancing actions across custodian rather than for each custodian in its own environment.

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# Whitepaper: Investor demands and demographics are shifting – are wealth advisors ready?



Download the full whitepaper

Download Whitepaper

Ongoing market volatility is prompting investors and wealth managers to recognize the value of portfolio diversification in distributing risk across geographies, industries, and asset classes. The wealth management industry is adapting to a sea change in investing as the market's prognosis for the short term remains subdued and hazy due to shifts in returns and investor sentiment following a lengthy bull market and low yields.

As such, investors' appetite for new portfolio strategies, such as direct indexing and alternative and private market investments, drives wealth industry capabilities beyond cryptocurrencies. In addition, wealth management firms are also beginning to refocus on earning the trust and wallet share of the mass-affluent segment and meeting the specific needs of women as they increasingly control more wealth, which is driving more emphasis on customer-centricity and personalization.

Demand for outsourced chief investment officer (OCIO) services and family offices is also rising as investment strategies evolve.

Technology and manual advisor roles are changing. More customer values-based investing, mass-affluent, and able to scale portfolio driven advising.

Here, we examine investment, growth, and risk.

Read the whitepaper

Complete visibility

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