



TIFIN Clout Case Study: Conversion through Clout

[Nathan Brown, CFP®, ChFC®, RICP®](#) from [My Personal CFO](#), a full-service financial firm committed to helping individuals and business owners, leveraged Clout to increase awareness and generate demand for his services. Brown turned to Clout to deliver personalized emails to target audiences and promote his webinars, leading to almost 200 attendees, over 50 meeting requests, and more than 10 new clients.

Clout helps financial advisors get the right content in front of target audiences. We use cutting-edge AI marketing that delivers hyper-personalized and relevant content based on firm objectives, target clients, or investments coupled with a hands-on marketing specialist dedicated to each advisor. Our human + AI approach delivers real results for advisors.



From interest to action

Brown planned on hosting two webinars focused on helping directors and executives avoid costly mistakes made when choosing employee benefits. With his messaging and audience in mind, Brown came to us with two targeted lists of prospective clients, but he needed help with the webinars' promotion, outreach, and follow-up strategy to ensure the best results.

Clout's human + AI-powered platform assisted Brown with email campaigns to achieve two primary objectives: raise awareness and generate leads. For awareness, Brown's dedicated Clout financial marketing specialist sent four email campaigns: three inviting prospects to register and attend the respective webinars and one post-webinar email, which included a recording of the event. To ensure high deliverability and strong performance metrics, Clout cleaned both email lists and tested for deliverability to maintain Brown's email IP reputation.



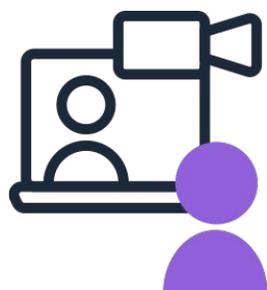


For lead generation, Brown leveraged his value-adding thought leadership on how he could help directors and executives avoid costly financial mistakes as a trusted financial advisor, exclusively available through his webinars.

The campaigns were spaced out to allow for proper notice, create urgency with last chance messaging, and help Brown stay top of mind with clients after the webinars. This multi-touch, consistent approach proved a key component of the campaign's success, with the strong sign-up, attendance, and conversion rates.

Campaign Results

My Personal CFO and TIFIN Clout



200

WEBINAR ATTENDEES



50

MEETING REQUESTS



10

NEW CLIENTS

Key insights lead to a successful campaign

Brown and My Personal CFO's experience is a great example of how targeted and consistent marketing can drive real return for advisors. A strategic plan centered on what you offer, who you want to reach, and how you want to engage with prospects can lead to clear business growth.