

Case Study: Providing Advisors with a Partnership-Driven Solution

WealthCare advisors, an RIA with roughly 175 advisors, was seeking a growth marketing solution to empower its workforce. WealthCare feels strongly about providing each advisor with all the tools they require to grow and thrive in their practice, partnering with technology solution providers where they don't have an in-house capability. It was during this search that they met TIFIN Wealth.



TIFIN Wealth's Content solution was designed for enterprises to enjoy a centralized command center for all of their marketing automation needs, ranging from content creation to detailed analytics.

Wealthcare needed a turnkey solution that was not only a software provider, but an extension of their marketing department. By partnering with TIFIN Wealth's Enterprise Solutions team, they were able to work together to meet Wealthcare's needs.

TIFIN Content not only helped Wealthcare's advisors stay top of mind and nurture prospects and clients, but TIFIN Content became a valuable tool for the internal marketing staff to deploy social media, newsletters, emails, and landing pages.

In the end, what made the difference was the collaborative relationship between the two firms. TIFIN Content's dedicated support team worked to not only understand Wealthcare's key marketing goals, but aligned content to their firm's distinct needs. The platform was able to incorporate their proprietary materials and value proposition as well.

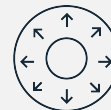
The pool of advisors using TIFIN Content at Wealthcare is growing, and the relationship is even expanding to explore other modular solutions that can be seamlessly integrated through TIFIN Wealth. Solutions include risk tolerance, planning, financial personality, charitable giving, private and public market investing, and more.

Wealthcare continues to source partners that provide tools to help drive growth and prioritize their advisors' business and expansion needs.

"TIFIN Clout has played an intricate part in helping our advisors create and execute the marketing strategies they have struggled to produce. Their turnkey platform gives our advisors the digital marketing strategy they need to drive engagement and generate leads."

- Shantese Smithers-Alexander, Marketing Manager

Why TIFIN Content?



**Drive More Leads
And Referrals**



Accelerate Conversions



**Build Trust And
Reputation**