Advisor Branding Program

CASE STUDY

Julie has been in the financial services industry since 2018 and began her career at Wealthspire as an intern. As a young professional, Julie is experiencing many of the same milestones as her peers and realized that there was a gap in education around basic financial decisions. She has dedicated her career to increasing financial literacy, encouraging young professionals to start early when it comes to setting goals, asking questions, and gaining confidence about their futures.

Julie is approachable, supportive, and adept at breaking down complicated money topics in a way that is easy to understand. Her willingness to share her own experiences – buying a first new car, budgeting in your 20s, etc. – is authentic and relatable for her target audience. In addition to growing her business, Julie is also passionate about helping to recruit college students to the industry, recognizing a need for a new generation of advisors to support changing client needs and the Great Wealth Transfer. She regularly speaks at her alma mater, Central Washington University, and maintains relationships with department heads.

She is also an active participant within the Wealthspire community. She serves on the DEIB committee, co-leads an internal research team for our financial planning software, and aids in developing best practices for our advisor team.

WEALTHSPIRE
ADVISORS

Julie Penwell

Ideal Client Info

Julie's ideal client is Ava, a 33-year-old female who lives in the Seattle, WA area. Over the past 10 years, Ava began her career in the corporate world at a tech company. On the side, she began her own business combining her love for entrepreneurship and the outdoors. Between her full-time role and her side business, she brings home $250,000 a year plus equity bonuses. Ava is currently single but is interested in dating and beginning a family in the next 10 years. Ava didn't grow up with wealth, so she is still working on developing deeper financial literacy. Growing up, her family lived paycheck to paycheck, but her parents prioritized giving their children the best education possible. She can be protective and hesitant with her assets but is looking to grow her wealth and knows a financial advisor can partner with her to do just that. Ava likes to have as much information as possible before making decisions and asks a lot of questions. Controlling her finances allows her to feel a sense of freedom. Her primary goal is to grow her wealth while being able to enjoy a balanced life.

Metrics for Success

- **Identify avenues to reach her ideal clients** in an authentic and non-intrusive way
- **Increased owned and earned media** in targeting industry and young professionals.
- **Recognition as a subject matter expert** for her work with young professionals

Strategy

- Curate digital presence to elevate Julie's brand
- Develop a video series targeting women and/or young professionals to align with her goal of expanding financial literacy
- Identify award/recognition programs that highlight Julie as a leader in the NextGen advisor space

Results

- Julie launched her professional Instagram (@julie_penwell), which led to **securing a $2MM AUM client within the first month,** mentions in Financial Advisor Magazine, and a call-out by NFP's CEO, Doug Hammond, on LinkedIn.
- Julie was selected as the 2024 **InvestmentNews NextGen Advisor of the Year** in June.

Next Steps

- Julie is preparing to launch a podcast that will expand upon her Instagram "Cash Convos" series.
- In addition, Julie is looking to host a women's circle for women aged 25-40 to begin sharing her knowledge in person and build her COI network.

ABOUT THE ADVISOR BRANDING PROGRAM

The Advisor Branding program is designed to establish individual advisor brands with the goal of helping advisors build new business and achieve marketing goals. We are committed to supporting the firm with marketing efforts at the regional, local, and individual level.

WEALTHSPIRE ADVISORS

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