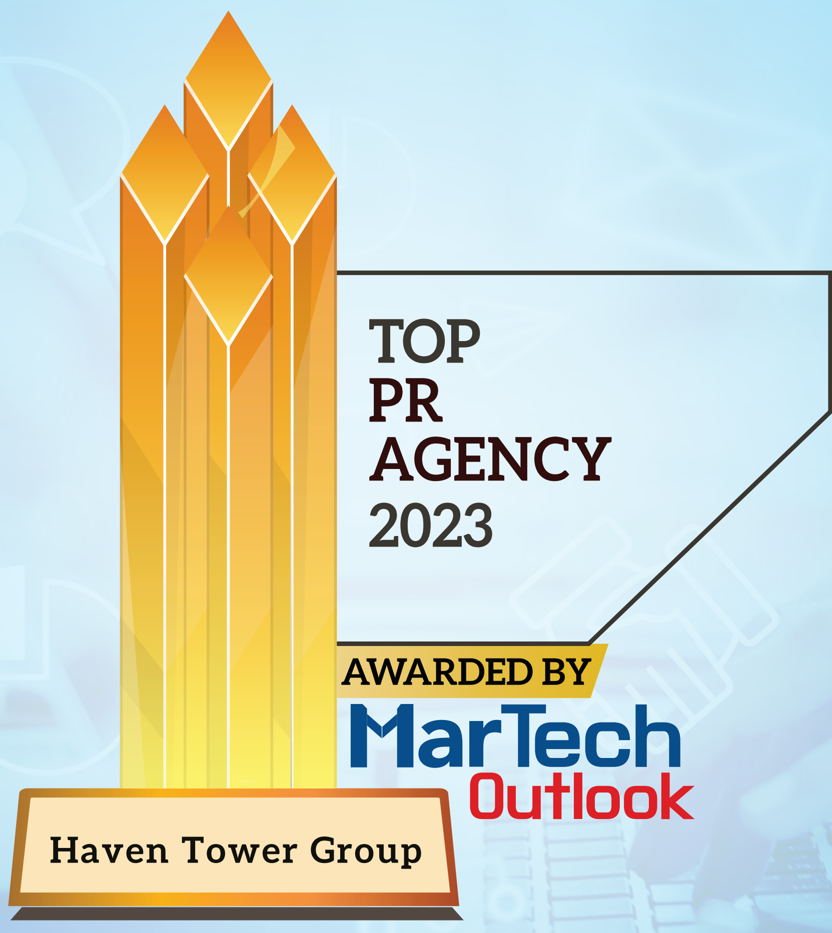
MarTech Outlook

MARTECHOUTLOOK.COM
ISSN 2644-254X

PR SOLUTIONS
EDITION



Haven Tower Group

Innovative Wealth Management Focus Drives Haven Tower's Accelerated Growth

The wealth management space has grown rapidly over the past 15 years, driven by demographic changes, evolutions in technology, shifting consumer demands, and a sharp increase in M&A activity.

With the industry expanding, companies increasingly need to elevate their brands. Indeed, building trust and awareness with audiences are crucial in today's crowded market.

That's where Haven Tower Group comes in.

Founded in 2011 and headquartered in Los Angeles, the firm's sole focus is delivering full-service PR and digital marketing to the wealth management industry. Haven Tower– which also has a presence in Seattle, Chicago, and New York City– emphasizes teamwork and ensures clients always have access to senior talent.

Led by Founder and CEO Joseph Kuo, the firm's leadership team also includes Michael Dugan, President and Managing Partner; Mitch Manning, Partner and Head of National Media; and Katherine Paulson, Partner and Head of Digital Marketing Strategies.

Dugan said, "Effectively serving wealth management firms requires a collaborative, team-based approach. It's the only way to deliver comprehensive and highly customized solutions that directly support the goals of clients."

> **"Haven Tower's continuous growth since 2011 is a function of our commitment to delivering an exceptional client service experience**

Supporting B2B and B2C Clients

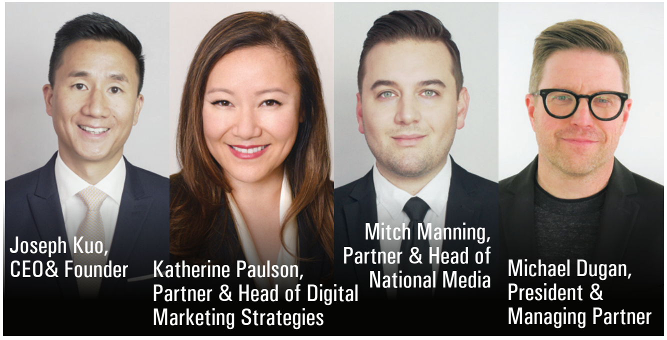
Haven Tower serves a broad range of B2B wealth management enterprises, including independent broker-dealers, RIA firms and RIA aggregators– which focus on financial advisor recruiting or firm acquisitions.

In addition, the agency supports third-party solutions providers. These include wealth tech companies, asset managers, M&A advisory firms, and financial advisor recruiting consultancies.

The firm also partners with B2C wealth management firms that compete directly with large, well-known Wall Street brands and need savvy PR and digital marketing strategies to level the communications playing field.

The combination of Haven Tower's industry focus and service model has allowed it to flourish. It enjoys yearly client retention rates of well over 80 percent. Meanwhile, its roster of clients encompasses some of the biggest names in wealth management: Advisor Group, Atria Wealth Solutions, the Financial Services Institute, Berkshire Global Advisors, Sanctuary Wealth, Stifel Independent Advisors, Pacific Life and Oppenheimer& Co.

"Haven Tower's continuous growth since 2011 is a function of our commitment to delivering an exceptional client service experience," said Kuo, who, before founding the firm, was Senior Vice President and Head of Public Relations at LPL Financial and, prior to that, a Partner with Kekst & Company (now Kekst CNC).



Joseph Kuo, CEO& Founder | Katherine Paulson, Partner & Head of Digital Marketing Strategies | Mitch Manning, Partner & Head of National Media | Michael Dugan, President & Managing Partner

"Accordingly, we reward conscientious, hard-working, and innovative professionals who think strategically and embrace teamwork. Also, unlike many agencies, where there is a constant churn of new business, we prioritize building long-term relationships with clients, who, in turn, are more likely to trust us with their most valuable assets – their brands and reputations."

Four Pillars of Capabilities, Focus on Client Service Experience

Haven Tower's capabilities span what its leaders consider are the four key pillars of brand elevation and reputation management: earned media, social media, owned media, and paid media.

The first 30 days of each engagement are a fact-finding mission, with professionals taking the time to learn as much as they can about the client. This process yields core messages, a forward-looking, multi-month strategic blueprint for PR and digital marketing as well as a social media playbook. These materials, together with media and presentation training, serve as the foundation that guides the ongoing client-service journey.

From there, all eyes turn to execution. The firm meets with clients at least twice a month to provide relevant updates, strategize and offer recurring performance and results reporting.

Paulson said, "Our strategic PR and marketing blueprint process is highly customized for each client's needs, and it is an approach that maximizes accountability and transparency."

"Clients hire agencies to generate a force multiplier effect on their brand elevation efforts without creating unnecessary demands on their time. We are only creating value for our clients when we deliver results on that basis," added Manning. MT