

Turning the Virtual BeFi Summit into an Industry Disruptor

KEY RESULTS:

1,770

registrants at peak performance with sustained engagement across three years

47%

attendance rate in 2025, significantly exceeding virtual event benchmarks

696

qualified leads generated with 5 immediate pipeline opportunities in 2025

Named Industry Disruptor

BeFi Summit took home the 2024 Wealthie, Industry Disruptor category



About Shaping Wealth

Shaping Wealth is a leading learning and engagement platform that helps financial professionals thrive personally and professionally. Grounded in behavioral finance, psychology, and neuroscience, Shaping Wealth combines live coaching, digital content, and intelligent AI tools like Lydia to help advisors build stronger relationships, make better decisions, and deliver advice that truly resonates. Its programs and customized learning solutions support advice firms of all sizes—from independent practices to Fortune 500 companies.

THE CHALLENGE:

Shaping Wealth entered our partnership with unmatched behavioral finance expertise and quality training offerings, but lacked industry-wide recognition as the definitive authority on human-centric financial guidance.

In the crowded wealth management education market, plenty of training providers claim to help improve client relationships and advisor effectiveness. Shaping Wealth needed to break through the noise, establish trust as the industry's premier learning platform, and shift the behavioral finance conversation from optional to foundational.

Individual courses are valuable but scattered content resources weren't telling the full story of the impact Shaping Wealth could have. They needed a platform that would attract industry leaders, validate their expertise, and create a movement around human-centric advice.

THE FULL INTENTION.LY APPROACH

Brian Portnoy, Founder of Shaping Wealth, conceptualized the BeFi Summit in 2023 as the industry's first behavioral finance-focused virtual conference. Together with Portnoy and his team, Intention.ly designed and executed an integrated marketing strategy to position the event as an intimate and inspiring antidote to generic, soulless webinars, while also delivering transformative professional development insights with immediately implementable strategies.



Data-Driven Email Marketing

We developed comprehensive email strategies leveraging year-over-year performance insights. For the 2025 campaign, we analyzed 2024 open rates, click-through rates, subject line performance, and optimal send times to build a proven promotional framework.

Strategic Social Media Promotion

We used organic social media to maintain consistent awareness throughout promotional periods, highlighting speaker announcements, session topics, attendee benefits, and countdown reminders. LinkedIn engagement peaked during event weeks as advisor participation built momentum.

Ambassador Toolkits

We armed the influential BeFi Summit speakers with ready-to-deploy promotional assets, including pre-written social posts, custom graphics, email templates, and key messaging points, to extend the Summit's visibility beyond Shaping Wealth's immediate network.

Visual Design and Brand Experience

High-impact graphics distinguished the BeFi Summit from generic webinars. We used vibrant speaker headshots on color-blocked backgrounds, clean landing page layouts optimized for conversion, and website banners driving homepage visibility. Press releases positioned the event as answering the wealth management industry's overwhelming demand for understanding the psychology of money, practically applied to modern advisor-client relationships.

Industry Recognition and Awards

We pursued strategic award nominations to amplify the event's visibility and credibility. The BeFi Summit won the 2024 Wealthie in the Industry Disruptor category, with WealthManagement.com's David Armstrong noting the event's "potentially seismic implications for the business of financial advice."

LOOKING AHEAD: REDEFINING THE IMPACT OF VIRTUAL CONNECTION

Together, Shaping Wealth and Intention.ly demonstrated the power of strategic vision paired with disciplined execution. The BeFi Summit proved that helping advisors and clients flourish is the foundation of modern wealth management, and Shaping Wealth now owns that conversation. They set the agenda. They attract leading voices. They define what human-first financial guidance means in practice. **With an established community of thousands of engaged advisors, repeatable marketing frameworks optimized year over year, and a revenue-generating platform making it all sustainable, Shaping Wealth is perfectly positioned to continue leading the human-first financial guidance revolution.**



Get in touch to learn more.

Let's talk about what we can work together to achieve. **Contact Kelly Waltrich** at kelly@growintentionally.com, visit www.intention.ly, or scan the QR code.