

Behind the Scenes:

How Silver Oak Turned Unplugged Into Its Biggest Advisor Event Yet With Intention.ly



Results at a Glance

- **25% above registration goal** — 156 registrations vs. a goal of 125
- **21% YoY growth in sponsorship revenue** — reaching \$242K
- **2027 event calendar locked in** a full year ahead

About Silver Oak Securities

Silver Oak Securities is a hybrid RIA built around independence, culture and advisor growth. Since 2022, Intention.ly has worked alongside the firm to bring structure to its marketing and transform its flagship advisor event into a signature experience for reps and partners.



Building the plane while flying it

Before Intention.ly, Silver Oak had big ideas about how to create a home for independent advisors that was built on culture, experience, and the resources they needed to grow. The instinct was sound, but the firm lacked the system and processes to execute consistently. No one specifically owned marketing, and events were put together on the fly, often days before they started.



They needed someone to organize their ideas and vision, both to stick to the plan and to stay within budget."

— **Mel Angert**, Silver Oak's account director at Intention.ly



Bringing Unplugged to life

Silver Oak wanted its flagship event to feel like Silver Oak, not like a generic industry conference. Billy's genuine love for music, and the event's Nashville location, gave Intention.ly the perfect opening to build something around that.

Intention.ly created the Silver Oak Unplugged concept, using Billy's love of music and the event's Nashville setting to turn the firm's culture into a distinct event experience. "Unplugged" became more than a name. It shaped the branding, agenda, programming and tone, giving Silver Oak a flagship event that felt unmistakably its own.

An end-to-end approach to event execution

With the concept in place, Intention.ly built the strategy around it. The team developed the promotional plan, shaped the agenda and speaker strategy, created sponsorship packages and coordinated sponsors, programming, venues, meals and activities.

On-site, Intention.ly served as Silver Oak's showrunner, managing attendee experience and programming while recording every session so the value of Unplugged could extend well beyond the event itself.

"The Intention.ly team is great to work with. They feel like part of Silver Oak, not contractors. They are key members of the team and can be relied upon whenever we need help."

- Tom McGuire, VP, Strategic Partnerships

The Results

156

registrations
25% above goal

\$242K

in sponsorship revenue
up 21% YoY

2027

event calendar planned
a full year in advance



Ready to turn your next event into a growth opportunity?

Let's talk about what we can work together to achieve.

Contact Kelly Waltrich at kelly@growintentionally.com,
visit <https://intention.ly>, or scan the QR code.