intention.ly

Building a Digital Engine for the Tech Equity Comp Market: Wealth With Options

Wealth With Options built its practice around a specific kind of client: tech employees and executives at companies like SpaceX, Amazon, and Tesla navigating complex equity compensation decisions. Expertise set the firm apart, but the team needed a digital presence to reflect their specialized knowledge and capabilities. Wealth With Options partnered with Intention.ly to **turn their niche into a marketing and growth engine.**

2 qualified prospects per week
over a three-month period

4 new marketing-sourced clients signed
during that time

60% increase in LinkedIn engagement
over 60 days

BRINGING DEEP EXPERTISE TO THE SURFACE

Wealth With Options' partners Jackie Lewis and Ryan Goldenhar have real authority in a space few advisors understand well: equity compensation, RSUs, ISOs, and the financial decisions that come with working at a major tech company.

What they needed was a digital presence built to communicate their expertise and a system that would turn that expertise into consistent engagement.

BUILDING AROUND THE NICHE

Intention.ly's strategy started with the audience. Rather than trying to go after every high-net-worth prospect, Wealth With Options wanted to reach tech employees and executives facing complex equity decisions - a group with its own distinct vocabulary, pressure points, and timing challenges around vesting and liquidity events.

Intention.ly built and launched a new website designed to speak directly to Wealth With Options' target audience and communicate the firm's specific expertise. From there, the team developed educational content around the exact decisions tech employees and executives face, including a financial freedom number framework and a dedicated equity comp decisions campaign.

Paid LinkedIn campaigns were geographically targeted and fine-tuned around the same niche, with organic LinkedIn content reinforcing the paid strategy and building the firm's authority in their space. Video content for the website and YouTube brought humanity and warmth to Jackie's and Ryan's expertise.

THE END-TO-END ENGINE

Intention.ly's work spanned the firm's entire digital presence:

- Brand messaging and positioning built around the equity comp niche
- Website strategy, copywriting, development, and launch
- Ongoing WordPress website management
- Paid LinkedIn advertising strategy, campaign management, and content development
- Organic LinkedIn strategy and content development
- Thought leadership and article development
- Video strategy and content, including YouTube channel setup and a website video carousel

FROM AWARENESS TO ENGAGEMENT TO NEW CLIENTS

From March through August, Intention.ly generated roughly two new qualified prospects per week, and Wealth With Options signed four new clients in that same window, each one a tech employee or executive navigating the equity decisions the firm specializes in.

Wealth With Options transformed a scattered digital footprint into a fully coordinated system: a website, paid advertising, organic social, video, YouTube, and thought leadership all built around the audience that matters most to the firm's growth.

"Not only did Intention.ly drive remarkable results for our firm, but they also proved to be a highly responsive and collaborative partner that truly felt like an extension of our team."

JACKIE LEWIS



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.