



# Positioning a New Financial Thought Leader

## Overview

Client: **SJK Wealth Management**

Industry: **Finance**

Services: **Public Relations Strategy**

## Results

- 12 media placements in local and national outlets, including **Newsday, US News, Fox Business, and Cannabis Tech**
- 182.4 million impressions
- Launch of new web series

## Challenge

**SJK Wealth Management** is a family-owned financial services business. The company is in the process of transitioning from the founder to the second generation. For that reason, it needed to demonstrate the expertise of its new leadership, including financial advisor and son-in-law, Christopher Tuck.

## Insight

Early on, we identified that what makes SJK different compared to other financial advisors is that the firm has deep expertise in portfolio management and the stock market. We worked to develop Chris as a thought leader by identifying the topics that were the most relevant for him. These included evaluating individual and industry categories of stocks. He also had insights to share around budgeting and savings so that families have more money to invest.

Our team also helped push the SJK thought leaders into new areas to showcase that the company was ahead of the curve. We explored new areas of opportunity for investors, including investing in marijuana companies, known as “pot stocks.”

## Success

With our knowledge of the media landscape, we were able generate media opportunities immediately. Our team began pitching Chris as an expert the day after our First Cut Session. Ultimately, Chris was in the media at a **national** and **local** level twice a month, talking about everything from budgeting for the holidays to whether to invest in JP Morgan stock. He also appeared in his **first online simulcast** about investing in marijuana companies.

SJK received over 180 million brand impressions from its media coverage. It also used the placements to stay top-of-mind and connected to its client base through social media and email marketing. Christopher Tuck clearly showed that he was a highly credible expert for clients today and in the future.

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### Pros, Cons to Buying JPMorgan Stock

Bank stocks are well-positioned these days and JPMorgan stock is at the front of the line for investors.

By Brian O'Connell, Contributor Nov. 19, 2018, at 10:51 a.m.



**15 percent of Americans have been skinned at gas pump: Survey**



By Sheryl Hanco-Haak, Contributor Updated November 2, 2018 6:02 AM

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