

# ACCLAIM

RECOGNIZING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY  
THROUGH THE *Family Wealth Report* AWARDS PROGRAM

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# Driving Organic Growth for Ultra-High-Net-Worth Clients



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## When it comes to organic growth, how can more wealth managers capture ultra-high-net-worth families?

Ultra-high-net-worth families need more than savvy investment management. They need true counsel – in family dynamics, tax strategy, business management, and legacy planning. So, attracting these types of clients requires a marketing and communications strategy that focuses on all services that a family office or wealth management firm provides. That means not simply highlighting investment acumen, but also areas like investment access, such as the availability of preferred private market deal flow.

It's also vital to go beyond talking about what you do as a firm to shift to preferred outcomes for potential clients. For instance, taxes are often the top concern for the wealthiest families. Instead of concentrating simply on where and how to invest, firms that specialize in ultra-high-net-worth families should instead distinguish themselves by highlighting how they invest in the most tax-advantaged way.

Finally, true family offices don't just manage a portfolio. They help a family govern itself across generations to protect and preserve legacies. Marketing and communicating these skill sets is vital for client acquisition.

## What role does public relations play in an organic-growth marketing plan?

Public relations is a term that means different things to different people. At Vocatus, we have always viewed it as any communication that reaches wider audiences, whether that means media interviews, content marketing, or social media management. As a result, public relations sits at the center of any campaign designed to build awareness and drive growth. Media mentions and interviews, for example, give current and prospective clients a sense of third-party validation of your firm. A steady stream of thought leadership and contributed content helps promote your differentiated thinking.

Yet, it's important to remember there is always a balance. Some firms make the mistake of being too visible. If you are speaking with the media, for instance, it has to be around topics that matter most to your preferred audience. Getting quoted in a story about, say, pinching pennies for savings will give you no credibility with a wealthy audience. If anything, it takes credibility away.

## How should firms approach social media as a growth tool?

We have found the single-best driver of marketing for ultra-high-net-worth firms is LinkedIn. That is the preferred platform of business owners preparing for an exit or highly compensated executives in need of advice. Ironically, it is also the most under-used platform by family offices.

Using LinkedIn effectively demands a formal strategy, however. You have to ensure you are positioning your brand properly, but you also must make sure that individuals' pages are positioned in the right way, as well. LinkedIn is driven by people, not brands, so using advisors' or executives' voices to deliver the right message is key to building a network and making connections. After all, people do business with people, not companies, and this is especially true of wealthy families.



Evolve Your  
Brand.  
Tell Your  
Story.  
Grow Your  
Business.

## Your Growth Partner

At Vocatus, your success is our success. We are a high-level, outsourced marketing firm, helping executives craft and execute their business strategies and goals through communications, sales, marketing, and advertising support.

We delve deeply into your history, successes (and sometimes misfires) to understand the many facets of your unique story. From there, we craft core messaging to bring your brand to life, position you as an industry leader and set you apart from competitors.

We create multi-channel communications programs to reach audiences where they live, including through earned media such as bylined articles and news stories in both trade and mainstream news outlets, social media, digital marketing and speaking opportunities.

By building strong relationships with our clients, we become their growth partner and an extension of their brand, helping to tell the many chapters of their story still to come.

## ➔ What We Do

- **Media Relations:** With media relations at the heart of our programs, we develop strategic plans that focus on reaching your audience through various media outlets
- **Digital Presence:** From creating websites and developing digital marketing campaigns to setting up and managing profiles on social media, we help businesses, and their executives, build a robust digital presence
- **Content Creation:** We turn thought leaders into trusted voices—across platforms, channels and always in control of the narrative.
- **Brand Protection & Vigilance:** Your reputation is your most valuable asset. We protect it fiercely—online and off—so you can lead with confidence.



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*Marketing or PR Campaign*

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