

OCTOBER 2026

ACCLAIM

RECOGNISING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY
THROUGH THE *WealthBriefing* AWARDS PROGRAMME

The *WealthBriefing*
Innovation in Marketing
Awards 2026



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

Your Growth Partner

Vocatus is a strategic communications partner dedicated to financial services firms. Operating as an outsourced CMO, we combine deep industry expertise with media relations, brand strategy, digital marketing, content, executive visibility and reputation management. Through close collaboration with leadership teams, we build integrated strategies that elevate credibility, convert attention into action and support long-term growth.



WINNER
Marketing Campaign (Americas)

Vocatus

➔ What We Do

- **Media Relations:** We develop strategic media programs that reach the right audiences, strengthen credibility and elevate visibility.
- **Digital Presence:** From websites and digital campaigns to social media, we help firms and their executives build a compelling online presence.
- **Content Creation:** We turn thought leaders into trusted voices across platforms while keeping them in control of their 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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Ray Hennessey - Vocatus

How Public Relations Strategies are Changing for Family Offices and UHNW Wealth Firms



Ray Hennessey
CEO
Vocatus

Why can't ultra-high-net-worth wealth management firms and family offices rely on the same public relations strategies used by broader financial services companies?

Because the audience is fundamentally different. Most public relations programs are designed to maximise visibility. For family offices and UHNW wealth management firms, the goal is to maximise credibility. These firms serve a limited number of clients, and their prospects make decisions based on trust, discretion, expertise, and personal referrals rather than broad brand recognition.

The wealth management industry is also highly relationship-driven. The people who influence business outcomes are not just potential clients, but attorneys, accountants, consultants, private bankers, and other centers of influence. Effective communications therefore require a deep understanding of the ecosystem and the media and industry conversations that shape perceptions within it. Generic business coverage may create awareness, but targeted visibility in respected wealth management, family office, and private wealth channels creates much greater business value.

How is artificial intelligence changing the communications landscape for family offices and UHNW advisory firms?

A: AI is rapidly transforming how information is discovered, evaluated, and shared. Increasingly, journalists, investors, advisors, and even prospective clients are using AI-powered search tools and assistants to identify experts, summarise firms, and compare service providers. As a result, public relations needs to focus on a digital footprint that consistently reinforces expertise across multiple channels.

Firms with a strong library of thought leadership, media citations, and educational content are more likely to be surfaced by AI-driven tools. Firms that maintain a limited public presence may find themselves invisible in an environment where

machines increasingly influence discovery and reputation.

At the same time, AI is flooding the market with generic content. That makes authentic expertise even more valuable. Elite advisory firms cannot compete by publishing more content. They must compete by publishing better content, informed by real-world experience working with wealthy families, business owners, and complex multi-generational wealth issues. As AI expands access to information, human credibility becomes a more important differentiator. Recent research also shows that meaningful AI adoption is becoming concentrated among larger, more sophisticated wealth management firms, signaling that technology and communications strategy are becoming increasingly interconnected.

What does successful public relations look like for UHNW firms in an AI-driven future?

A: The most effective communications programs will combine earned media, executive visibility, original research, conference participation, digital content, and strategic social media into a single reputation-building effort.

Family offices and UHNW wealth managers possess something AI cannot replicate: trusted relationships, decades of experience, and nuanced judgment developed through real client interactions. The role of public relations is to make that expertise visible and discoverable. Firms that consistently articulate their point of view on markets, wealth transfer, governance, philanthropy, private investments, and family dynamics will become go-to resources for reporters, referral partners, and prospective clients.

In an AI-driven world, reputation compounds. Every article, interview, and executive insight becomes another data point reinforcing a firm's authority. For UHNW firms, specialised public relations is a strategic asset that helps transform expertise into influence, influence into trust, and trust into long-term growth.



Winner

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Congratulations
TO ALL
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