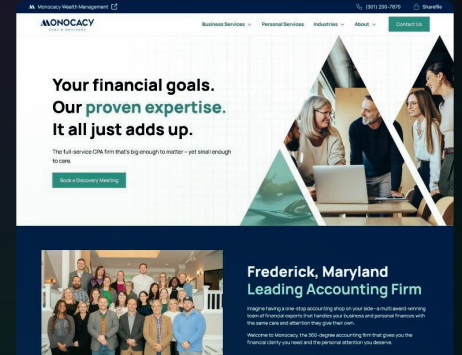


CLIENT SPOTLIGHT

From Commodity CPA to 10.6x ROI Growth Engine

CLIENT	INDUSTRY	LOCATION	ENGAGEMENT	TIMELINE
Monocacy CPAs & Advisors	CPA & Advisory	Frederick, Maryland	Full Growth System	June 2024 - Present



10.6x
Year 1 ROI on SEO

4.0x
Year 1 Total ROI

\$200K+
New Revenue from SEO

40
New Clients Acquired

THE CHALLENGE

A Strong Firm Held Back by Its Own Brand

When Monocacy CPAs & Advisors (formerly Faragalla & Associates) partnered with WISE in mid-2024, they had built a strong firm — but their brand, positioning, and growth strategy were holding them back.

They wanted to evolve into a modern, full-service advisory firm focused on high-value client relationships, not transactional tax work.

 Inconsistent flow of qualified clients — growth depended heavily on unpredictable referrals.

 Positioned as a commodity CPA firm with no clear differentiation in the market.

 No scalable growth strategy in place to support the firm's \$10–15M long-term vision.

BRAND TRANSFORMATION

Renamed. Rebranded. Repositioned.

From transactional tax firm to high-value advisory partner.

BEFORE



Faragalla & Associates

- Generic, undifferentiated market presence
- Positioned as a transactional service provider
- Attracted lower-value, one-off engagements
- Limited ability to communicate full-service value

AFTER



Monocacy CPAs & Advisors

- ✓ Premium brand aligned with advisory positioning
- ✓ Clear messaging around full-service financial partnership
- ✓ Designed to attract high-value prospective clients
- ✓ Built for scalability across markets and services

THE SOLUTION

WISE Growth System: Position → Attract → Convert

Each component directly addressed a core constraint in the business.

STEP 01

Position

Solves: Commodity firm perception

Full rebrand including name, identity, and messaging.
Alignment with wealth advisory partner firm. Clear articulation of full-service, high-value offering.

The firm is now perceived as a strategic advisor — not a commodity provider.

STEP 02

Attract

Solves: Inconsistent client pipeline

SEO-driven strategy to capture high-intent search traffic.
Content and website structure aligned with ideal client profiles. Expansion beyond referral-based growth.

A consistent pipeline of high-quality prospective clients — not just more clients.

STEP 03

Convert

Solves: No scalable growth system

Website designed for conversion, not just information.
Structured intake and lead handling process. Full tracking and performance visibility.

Marketing became a measurable, repeatable system — not guesswork.

THE RESULTS

Performance That Speaks for Itself



YEAR 1 PERFORMANCE — 2025

40

New clients acquired via SEO

\$200K

New revenue from SEO alone

10.6x

ROI on SEO investment

4.0x

ROI on total WISE investment

SEO alone delivered 55.5% of their entire new business goal for the year — surpassing expectations in their first year ever acquiring clients online.



YEAR 2 — 2026 YEAR TO DATE

12.2x

ROI on SEO investment

8.0x

ROI on total investment

In Year 2, we surpassed the entire Year 1 revenue number **within the first quarter alone** — and the engine is still accelerating.

WHAT'S NEXT

The Road Ahead



Expanding Acquisition Channels

Moving beyond SEO to build multi-channel demand and reduce single-channel dependence.



Doubling or Tripling ROI

Targeting 2-3x the current return as the growth engine matures.



Increasing Conversion Efficiency

Optimizing intake and nurture systems to convert more of the growing pipeline into clients.



Deepening Client Lifetime Value

Bringing wealth management formally into the fold to serve clients across more of their financial journey.

Ready to Build Your Growth Engine?

See how the WISE Growth System™ can transform your firm's positioning and client acquisition.

