

Building a Network of Independent Advisors

L.M. Kohn & Company

Challenge

L.M. Kohn & Company was a Cincinnati-based hybrid registered investment advisor (RIA) and broker-dealer founded in 1990. The firm first engaged O'Keeffe PR in 2019 to help manage its messaging and protect its reputation during a challenging period. Pleased with the results, L.M. Kohn asked O'Keeffe to take on a bigger challenge—helping the firm grow.

L.M. Kohn's growth depended on expanding its network of representatives. Its target audience was established financial advisors at large wire houses and national brokerage firms who were tired of the corporate culture, of being limited to company-approved investment products and services and of excessive costs and fees eating into their bottom lines. L.M. Kohn offered these advisors the chance to go independent and build their own practices, with the support of a family-owned firm behind them.

But the firm struggled to communicate the benefits of that move, and it lacked the marketing and social media expertise needed to attract and engage new representatives. Its social media profiles had been abandoned, its website wasn't optimized to be found, and there was no consistent content reaching the advisors it hoped to recruit. L.M. Kohn needed a partner that could use digital marketing to reach prospective representatives, all while staying compliant with the strict regulations of the financial services industry.

Solution

O'Keeffe PR began with an audit of L.M. Kohn's website, then recommended and completed adjustments to improve search engine optimization (SEO). The team also took over the company's dormant social media profiles, refreshing their look and building a following from the ground up with a regular schedule of daily posts that combined custom content with curated, relevant third-party content. O'Keeffe also developed and executed paid social campaigns to drive targeted traffic to the company's website and attract advisors interested in partnering with the firm.

Next, O'Keeffe developed a content strategy to raise awareness of L.M. Kohn and the benefits of going independent, with monthly blogs and occasional news releases on the firm's website. Content themes included:

- Newsworthy industry events and what advisors needed to know about them
- The benefits of affiliating with L.M. Kohn
- Company events and news that showcased the firm's small, family-owned culture and supportive work environment
- Profiles of the compliance team that demonstrated the firm's deep bench of professionals

Because L.M. Kohn worked in a heavily regulated industry, compliance was a critical focus throughout the engagement. O'Keeffe made sure all content met regulatory standards, using language and messaging that would not raise compliance concerns or risk misrepresentation. Website and social media growth were tracked through monthly analytics reports. When L.M. Kohn acquired another advisory firm, O'Keeffe also handled the PR and messaging around the acquisition.

Results

Since partnering with O'Keeffe, L.M. Kohn achieved a significant increase in both social media following and engagement, leading to greater visibility for the firm and ultimately…acquisition. Highlights include:

- Built L.M. Kohn's LinkedIn channel from the ground up:
    - Increased LinkedIn following 130% in first 9 months
    - 16.5% average engagement rate on posts
    - 10.3% page engagement rate
- Performed a website and SEO audit and completed recommended improvements
- Launched paid social campaigns that drove targeted advisor traffic to the website
- Created monthly SEO-optimized blogs, news releases and daily social content, all compliance-ready
- Delivered monthly website and social media analytics reports
- Handled PR and messaging for L.M. Kohn's acquisition of another advisory firm.

The increased digital presence and steady flow of content contributed directly to the firm's growth, with several new representatives joining L.M. Kohn's network across the Midwest during the engagement. The firm also noted that O'Keeffe's expertise allowed its team to focus on the core of its business without the daily burden of managing its own marketing.

L.M. Kohn & Company was acquired by Wealth Enhancement in December 2025. Its team now serves clients as part of Wealth Enhancement's Cincinnati office.