

## MILL CREEK CASE STUDY

# Transforming the Brand and Web Presence of a \$10B AUM Wealth Advisory Firm

### The Challenge:

Our client, a wealth advisory firm serving ultra-high-net-worth individuals and institutional clients, needed a website that reflected its sophisticated service offering, deep expertise, and distinct audience needs.

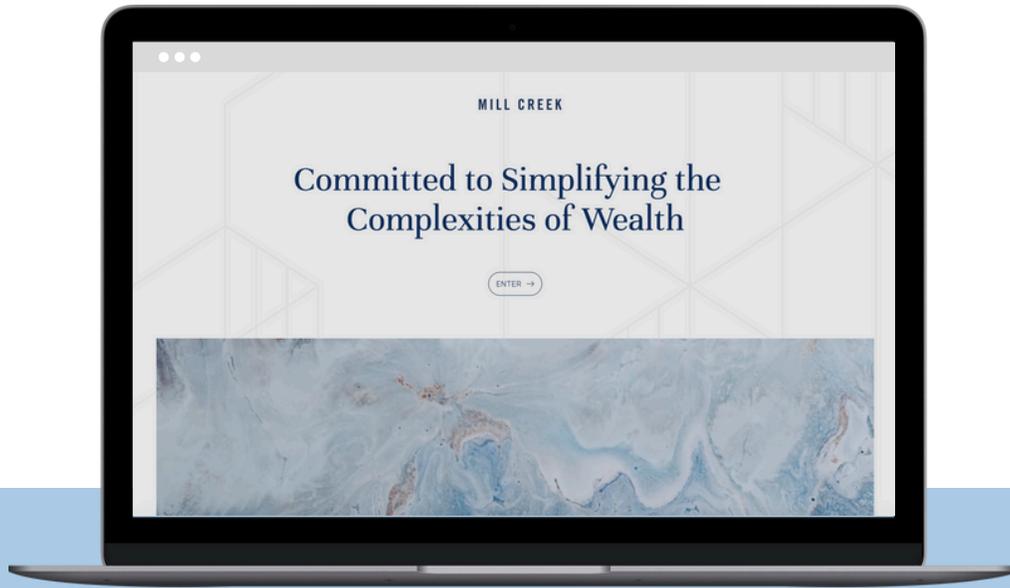
Their existing site, a single page with no deeper navigation, failed to tell a compelling or cohesive story about their unique value proposition or outstanding client experience. It also lacked content depth or a keyword strategy, which significantly limited SEO opportunities. Photos of Philadelphia spoke to their local presence, but didn't capture nationwide support capabilities or offer the visual refinement of their competitors.

### BEFORE



### What We Did:

- Branding
- Messaging
- Design
- Web Development



## Visual Brand and Messaging

We translated their existing aesthetic into a clean, sophisticated look and feel that better resonates with ultra high-net-worth and institutional clients. We also developed a messaging framework that captures the value the firm provides in a compelling and relatable story, including investment philosophy and process, team experience, and distinct service lines.

INSTITUTIONAL INVESTMENT MANAGEMENT

# A Trusted Strategic Partnership

At Mill Creek, we're committed to providing sophisticated investment solutions tailored to the specific objectives and challenges of our institutional clients, including educational organizations, foundations, endowments, nonprofits, and pension funds.



HOW WE INVEST

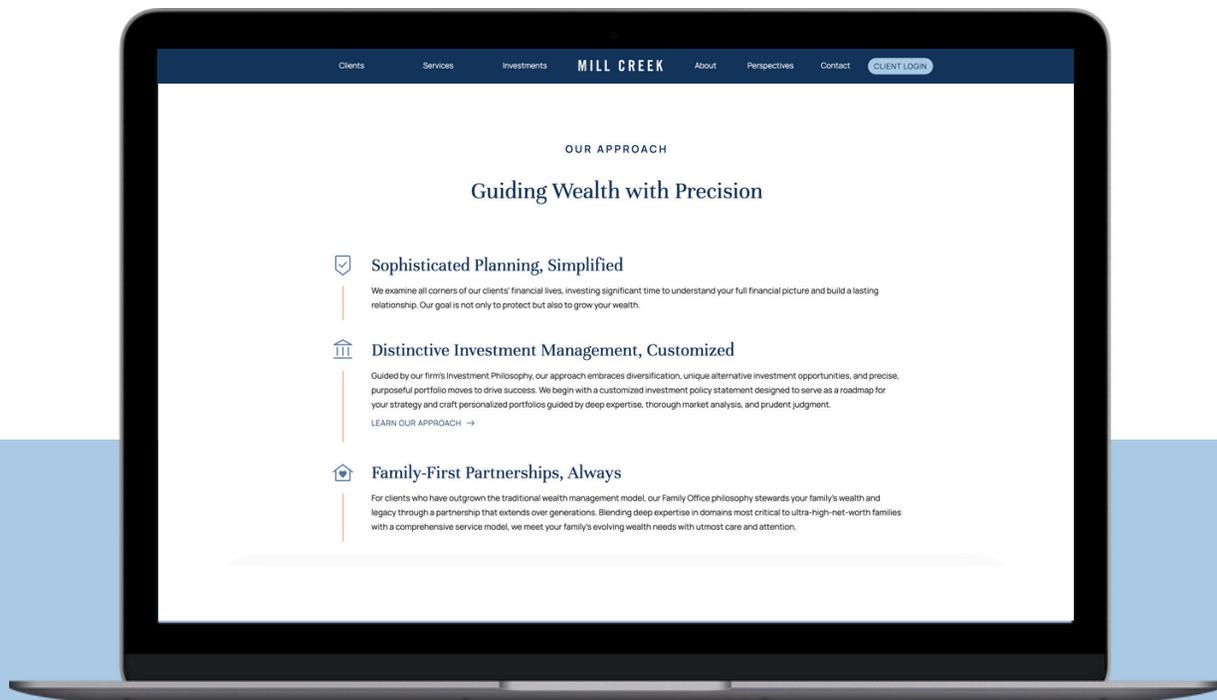
## Our Investment Philosophy & Process

Investing at Mill Creek is a customized, disciplined, research-intensive process that includes traditional and alternative assets. Our objective is to design portfolios that deliver equity-like returns with balanced portfolio risk characteristics over the course of a full market cycle. The results of the process serve as a starting point for customization based on our clients' distinct goals and objectives.



## Website Refresh

From a single page to a full website with intuitive navigation and target keywords, built using new brand visuals and thoughtful messaging, we transformed our client's web presence into a robust, cohesive experience for visitors. The updated site, [millcreek.com](http://millcreek.com), tells a more complete story and guides users through a deliberate journey based on their unique needs and pain points.



### Brand Story Collateral

To ensure a cohesive experience for everyone interacting with our client, we applied the refreshed branding and messaging across key thought leadership and sales pieces, including whitepapers, a 150-slide library, and beautifully designed brand story resources that empower the team to communicate their value while maintaining brand integrity.

