

BRAND STRATEGY CASE STUDY: PrairieView Wealth Partners

How They Used Faith and Focus to Drive Unprecedented Growth

Client: PrairieView Wealth Partners

Founder: Tim Regan

Website: prairieviewwealthpartners.com

The Challenge

When Tim took over PrairieView Wealth Partners from his father, the firm was successful but stagnant. They weren't reaching younger generations who needed financial planning, and Tim's vision to expand through partnerships with other firms seemed out of reach.

Tim's initial resistance to branding stemmed from a narrow view of what branding entailed - he thought it was just about logos and images. What PrairieView needed was a deeper understanding of how a clear, purpose-driven brand could set the foundation for growth and expansion.

The Process

We began by uncovering what truly set PrairieView apart: its Christian values. These values weren't just part of Tim's personal life; they informed every aspect of the business - from client interactions to financial decision-making. By embracing this as a differentiator, we created a brand that could resonate with both clients and potential partner firms.

Here's how we approached the transformation:

- **Defined the Brand Purpose:** Positioned PrairieView as a faith-based financial firm committed to guiding clients with integrity and values, combining faith and market expertise.
- **Refined Messaging:** Shifted the focus to younger clients by addressing their unique financial concerns and aspirations in a way that resonated with their values.
- **Built for Expansion:** Developed a brand that projects strength, trust, and shared values, making PrairieView attractive to other independent firms looking for partnership opportunities.

The Transformation

In just 18 months, PrairieView has achieved remarkable results:

- **41% Increase** in Funds Under Management: The new messaging and focus helped attract younger clients and re-engage existing ones, driving significant growth.

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- **Expansion Through Acquisition:** PrairieView has successfully acquired two firms with six offices and is in active negotiations to acquire two more.
- **A Clear Path for Long-Term Growth:** With the foundation set by the branding strategy, Tim now has a clear roadmap to scale PrairieView significantly over the next decade.

“Working with Dawud was a game-changer for us. I’ll admit, I thought branding was just about logos. But Dawud showed us that branding was about who we are at our core, who our clients are, and the gaps between us. His work helped us bridge those gaps. Now we know what our clients really want from us - connection and trust. He helped us realize that our Christian values weren’t just something we believed - they were the key to differentiating ourselves and building trust with our clients and partners.”

“Since, we’ve grown faster than I ever thought possible. We’ve increased our funds under management by 41%, acquired two firms, and have a clear strategy to keep growing. More importantly, my team and I feel aligned with our purpose, and we know exactly what we stand for. Dawud didn’t just help us build a brand—he helped us build a legacy.” - Tim Regan, founder, PVWP



The Result

PrairieView Wealth Partners is no longer just a successful family firm - it’s a growing, purpose-driven brand that connects deeply with clients and partners. Tim’s vision of expansion is becoming a reality, rooted in the clarity and direction provided by a strong brand foundation.