

## Keep Your Message in Front of Investors Across their Journey

Financial professionals don't live in a single channel. They consume content, explore opportunities, and make decisions over time. GK3's programmatic strategy surrounds your audience across the platforms they trust. We deliver visibility through targeted ad placement built for how investors actually behave. The goal isn't just clicks. It's staying visible across their journey to build recognition and trust.

### 5 Ways to Stay Visible to the Right Investors



#### Target by home address

Deliver ads to known investor households using **Household Addressable** targeting.

#### Reach past site visitors

Stay visible to warm prospects with **Website Retargeting** after they leave your site.

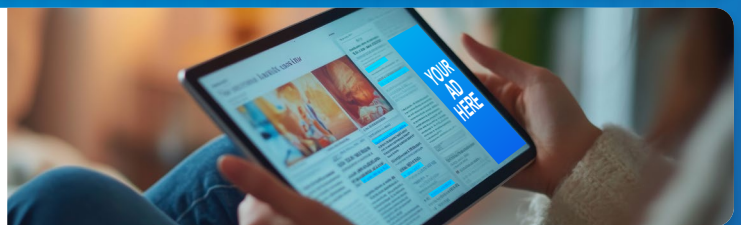


#### Target based on search terms

**Keyword Search Retargeting** shows your ads to users who've searched for financial topics.

#### Place ads on related content

Appear alongside relevant articles using **Keyword Contextual Targeting**.



#### Reach investors at events

Use **Event Targeting** to serve ads to people who attend specific conferences or venues.

# Programmatic Advertising Household Addressable (Geo-Fencing)



## Target specific households using verified address data for precise 1:1 targeting

### Why this tactic works

Household Addressable targeting uses CRM data and home addresses to deliver your ads directly to specific investor households. Household Addressable ensures you reach high-value prospects, like RIAs, family office targets, and Accredited Investors in their exact location.

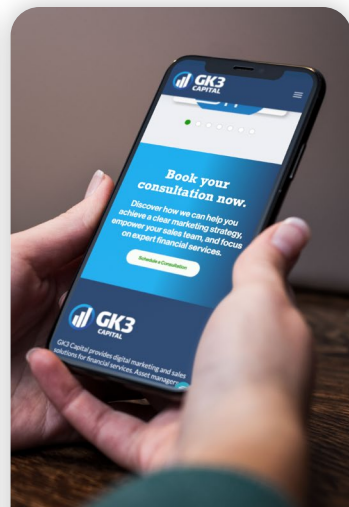
### What you gain with this tactic

- **Deliver ads to known prospects** using verified address lists
- **Compliment CRM and sales outreach** with supporting ad campaigns
- **Near 100% match rate accuracy** at the household level
- **Stay compliant** while gaining precise reach across devices



## How household addressable targeting reaches high-value investors

bert Reinhart	4132 Ritter St Huntsville AL,
my Davis	4843 Clay Stre Indianapolis IN
chel Sanderson	1140 Hickory Las Vegas NV,
ry Winifred	3551 Deans L Nyack NY, 109
ry McGire	3205 Bassell A Rock AR, 7221
rek Trale	1446 Oak Ridg Flat River MO,
ed Fadhair	3629 Badger F Skyway FL, 33
ic Filler	2048 Rocket L Minneapolis M



#### 1. Upload address list

Start with CRM data, FINTRX exports, or investor mailing lists.

#### 2. Match to digital devices

Addresses are digitally mapped to household-level devices via plat line data.

#### 3. Serve ads to household devices

Ads are delivered to mobile, tablet, and desktop devices at that home.

#### 4. Drive awareness or action

Promote fund materials, thought leadership, or direct appointment CTAs.



# Programmatic Advertising Website Retargeting



## Re-engage visitors who leave your site without converting

### Why this tactic works

Most site visitors don't convert on their first visit, but that doesn't mean they aren't interested. Website Retargeting keeps your message in front of warm prospects after they leave your site, facilitating further engagement so you can continue to nurture your leads through the marketing and sales funnel.

### What you gain with this tactic

- **Re-engage visitors** who left without converting
- **Improve conversion rates** by staying top of mind across channels
- **Deliver follow-up ads** based on specific pages they visited
- **Maximize the ROI** of existing website traffic and campaign spend



## How website retargeting brings visitors back to your brand



### 1. User visits your website

A visitor lands on a product, service, or thought leadership page.



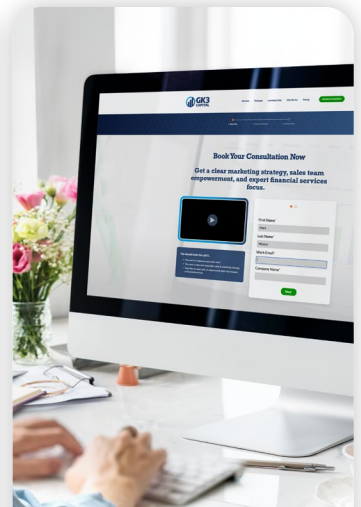
### 2. Visitor leaves without converting

They browse away without filling out a form or booking a meeting.



### 3. Ad campaign activates

Their device is tagged, and they begin seeing your ads on other sites.



### 4. User returns or converts

They come back to your site, re-engage with content, or take the next step.

# Programmatic Advertising Keyword Search Retargeting



## Reach prospects based on what they've searched across the web

### Why this tactic works

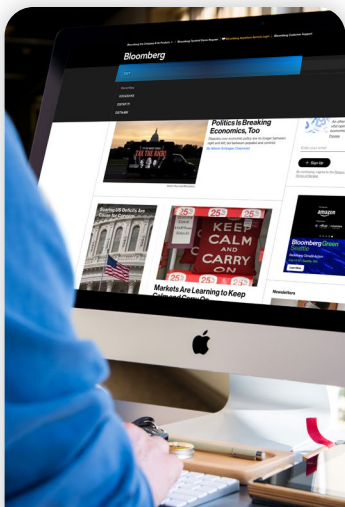
Search behavior reveals what someone is thinking about. Keyword Search Retargeting lets you serve ads to users who have searched for specific financial terms on publisher and partner sites, rather than Google. It's a way to connect with prospects who are actively researching, even if they've never been to your website.

### What you gain with this tactic

- **Target people actively researching financial topics** based on recent search behavior
- **Serve ads to users who never visited your site** but showed interest through keywords
- **Reach prospects at the moment of exploration** when your message is most relevant
- **Focus ad delivery on high-intent search terms** tied to your offering or strategy

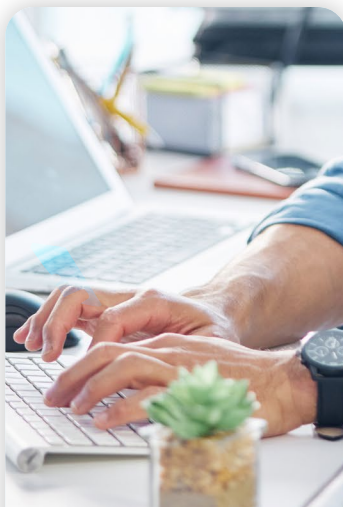


## How keyword search retargeting reconnects with high-intent investors



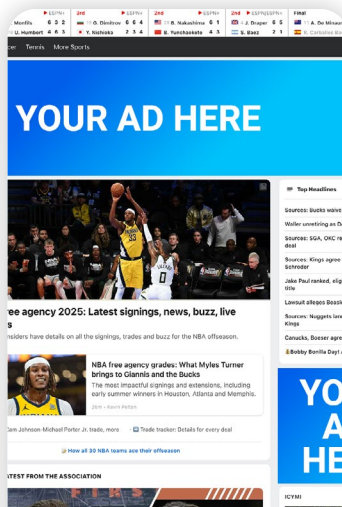
### 1. Investor searches a financial topic

A user searches for a financial keyword outside of the Google network.



### 2. Search is captured

Their search behavior is captured anonymously.



### 3. Ad is delivered

Your ad is served across relevant websites and apps.



### 4. Investor reconnects

They click or return when your message aligns with their interest.



# Programmatic Advertising Keyword Contextual Targeting



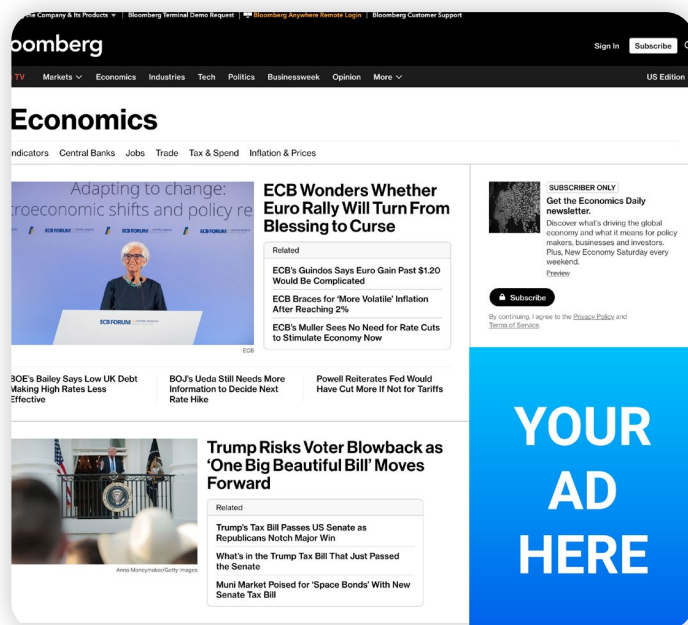
## Place your ads alongside relevant financial content

### Why this tactic works

Context matters. This tactic places your ads on pages where the content includes specific financial keywords. It's a privacy-friendly, cookieless way to stay visible to investors who are consuming content aligned with your message, even if they haven't searched or visited your site.

### What you gain with this tactic

- **Align your brand** with the financial topics your audience reads about
- **Appear next to articles, news, or commentary** that match your offering
- **Stay compliant** with evolving privacy standards using a cookie-free approach
- **Maintain visibility** with investors in passive research mode



## How keyword contextual targeting aligns your message with investor interests

### Keywords for each Ad Group

what is a 1031 exchange  
1031 tax exchange  
1031 tax deferred exchange  
1031 exchange basics  
1031 property exchange  
1031 exchange explained  
capital gains exchange  
understanding 1031 exchange  
what is a delaware statutory  
best 1031 exchange company  
capital gains tax 1031 exchange  
section 1033

#### 1. Define your keywords

You define a list of relevant financial keywords or topics.

### Understanding 1031 Exchanges How They Work

A 1031 exchange—also known as a 1031 exchange, 1031 tax deferred exchange, capital gains exchange—is a powerful strategy available to real estate investors. Governed by Internal Revenue Code Section 1031, it allows an investor to defer paying capital gains taxes when they sell an investment property, as long as they reinvest the proceeds into a like-kind property.

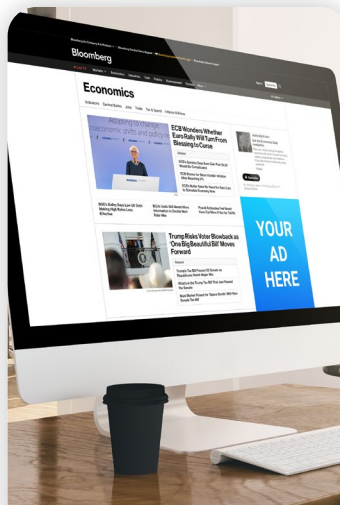
This process is known as a 1031 property exchange, and it's a key tool for those to build long-term wealth through real estate. So, what is a 1031 exchange exchange? At its core, it's a way to sell one investment property and purchase another without triggering an immediate tax liability.

#### 1031 Exchange Basics and Alternatives

For those new to the concept, it's

#### 2. Scan for matching content

Pages across the web are scanned for content containing those terms.



#### 3. Match pages to your criteria

Ads are placed only on pages that match your criteria.



#### 4. Appear where investors are reading

Your message appears alongside content investors are already reading.

## Engage investors during and after the events they attend

### Why this tactic works

You don't need to be at the event to reach the audience. Event Targeting lets you serve ads to attendees based on their physical presence at industry conferences, meetings, or forums. It's a smart way to stay visible before, during, and after key events.

### What you gain with this tactic

- **Reach verified event attendees** using real location data from conferences and summits
- **Deliver mobile ads during and after the event** to extend your presence beyond the venue
- **Avoid the cost and complexity of a booth** while still capturing high-value attention



## How event targeting reaches and retargets conference attendees



### 1. Target the event location

Draw a virtual geo-fence around the conference venue (e.g., hotel, convention center).



### 2. Identify attendee devices

Mobile devices that enter the geo-fenced area are tagged for campaign use.



### 3. Reach them with display or native ads

Ads are shown to attendees during and after the event as they browse apps and websites, helping keep your brand visible and top of mind.



## Choosing the right format: Display vs. Native

Every GK3 programmatic campaign uses one of two core ad formats: display or native. While both are effective in reaching investors across digital channels, each format plays a different role depending on your goals, creative assets, and where your audience is browsing. Understanding the distinction helps you align creative and messaging with the moment



### Display Ads

Banner-style ad placed around website or app content

Branding, retargeting, fund launches, event campaigns

Across financial sites, mobile apps, publisher networks

Fast visibility and broad reach

### How it Looks

### Best For

### Where it Runs

### Strength

### Native Ads

In-feed ad styled to match the surrounding editorial content

Promoting whitepapers, insights, thought leadership, educational content

Embedded within article feeds on premium financial and business sites

Higher engagement and trust through seamless content integration

### How formats support your strategy:

- **Event Targeting:** Most effective with Display Ads to stay visible during and after the event
- **Household Addressable:** Works with either Display or Native, depending on the campaign asset
- **Website Retargeting:** Leverages Display Ads for brand recall
- **Keyword Search Retargeting:** Can use Native Ads to promote relevant content based on search intent
- **Keyword Contextual Targeting:** Best served with Native Ads for educational and in-context messaging

## Reach your audience where they spend time online, not just where they search

### How Programmatic Advertising Complements Google Ads

At GK3, we use both Google Ads (SEM) and programmatic advertising as part of a comprehensive digital strategy. SEM is ideal for capturing high-intent search activity. Programmatic expands your reach by keeping your brand visible across the websites, articles, and content your audience engages with every day.

#### Overview

**Programmatic and SEM aren't competing. They're complementary.**  
SEM catches the hand raised. Programmatic keeps your brand top of mind before and after that moment.

#### Programmatic Advertising

Publisher sites such as Forbes, CNBC, mobile apps, and across the web

Browsing behavior, content context, location, or CRM data

Display and native ads integrated into content and layout

Build awareness and stay visible across the decision-making journey

Persistent visibility and broader brand exposure

Full-funnel visibility, retargeting, and brand reinforcement

#### Where Ads Show

#### How Ads Are Triggered

#### Ad Format

#### Goal

#### Strength

#### Best For

#### Google Ads (SEM)

Google Search, Gmail, YouTube

Keyword search on Google

Primarily text-based search ads

Capture demand through search intent

Immediate response to known intent

Bottom-of-funnel lead capture

**Stay visible to the investors that matter.**

Let's build your custom programmatic campaign.

[Schedule a Strategy Call](#)