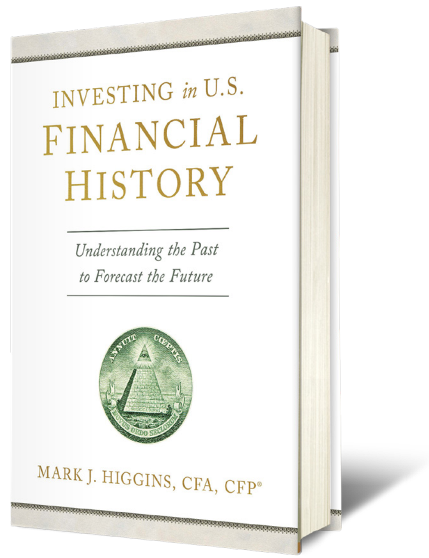
CASE STUDY

FROM MANUSCRIPT TO MOVEMENT: HOW ONE BOOK BECAME A PLATFORM FOR INSTITUTIONAL INFLUENCE

The Challenge



When the COVID-19 pandemic sent shockwaves through global markets in March 2020, Mark Higgins was working as an investment consultant advising large institutional investment plans. Like much of the financial world, he found himself caught off guard. Seeking a way to regain his bearings, he immersed himself in financial history in the months that followed. Before long, he noted that many of the events people viewed as "unprecedented" had happened before. The real problem was that most practitioners had simply forgotten the lessons of the past.

He was also surprised that nobody had written a single accessible volume that surveyed the full 250-year history of the American financial system through the lens of a working investment professional. Most financial history books seemed to be either highly academic or narrowly focused on specific events. Higgins set out to create something broader, more practical, and useful for modern readers trying to interpret present-day markets.

By the time he approached Greenleaf Book Group, much of the manuscript preparation was already underway. Mark needed a publishing partner who could move quickly, preserve his editorial vision, and deliver a professional distribution infrastructure he could not build on his own.

The Book and Its Vision

Higgins had a clear sense of his audience from the outset: investment professionals (including portfolio managers, advisors, and consultants) as well as graduate students, undergraduate students, policymakers, and intellectually curious readers. That clarity shaped the platform strategy Greenleaf developed alongside him.

Greenleaf identified an opportunity to position Higgins as a leading voice in applied financial history—the practice of using historical financial events to better interpret modern markets and institutional decision-making. The approach centered on long-term credibility rather than short-term promotional activity. LinkedIn thought leadership, long-form essays, speaking engagements, podcasts, newsletters, and Substack became the central pillars of his platform.

Higgins proved to be a strategically minded publishing partner. He came with deep knowledge of his target audience and worked closely with the Greenleaf team to align on positioning and branding decisions that would resonate with readers in the finance and investment space.

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The Publishing Process

Investing in U.S. Financial History is an ambitious, richly researched work, and Greenleaf's editorial team rose to match it. The book's scope spans nearly 250 years of financial history with extensive figures, charts, and endnotes, which called for careful coordination to ensure every element was polished and cohesive. The result was a book that fully delivered on Higgins's original vision.

Distribution was a core reason Higgins chose the hybrid publishing model. He wanted professional-grade distribution without sacrificing control over content and presentation, and Greenleaf's infrastructure provided both. Speed was equally essential; traditional publishing routes, which would have required working through a literary agent, were simply too slow and too restrictive.

On the marketing side, Higgins brought meaningful assets: strong endorsements from thought leaders in the investment space and an existing connection to the Museum of American Finance. He also engaged Smith Publicity for PR support at launch. Greenleaf's marketing team coordinated alongside these efforts to position the book for long-term visibility.

> **"There are two things that were non-starters for me with a traditional publisher: Speed was essential, and I wanted to own the content. A hybrid publisher was the only way to achieve these objectives."**

Recognition and Media Reach

Following publication in 2024, *Investing in U.S. Financial History* earned recognition across multiple sectors. The book received major industry awards:

- Best Book in "Finance," 2024 NYC Big Book Awards
- Best Book in "Personal Finance/Investing," 2024 American Book Fest "Best Book" Awards
- Bronze Medalist in the Personal Finance/Retirement Planning/Investing category, 2024 Axiom Book Awards

Media coverage reinforced the book's reach. Higgins secured a feature article in *The Wall Street Journal* in September 2025 and contributed more than twenty articles to the CFA Institute's *Enterprising Investor*, exploring topics ranging from Federal Reserve monetary policy to risks in private markets. That body of work led to his recognition as one of the CFA Institute Research and Policy Center's Voices of Influence.

His platform has grown steadily in line with the strategy Greenleaf helped establish. His LinkedIn audience has reached nearly 9,000 followers, his Substack has grown to nearly 2,000 subscribers, and his website has evolved into a hub for ongoing financial commentary and historical analysis.

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The Moment It Became More Than a Book

For Higgins, one of the clearest signals that the work had taken on a life beyond the page came when he began making public predictions grounded in his historical research.

> **“Early on, it was scary to make predictions. Particularly with the Fed when they began loosening monetary policy in August of 2024. I felt like I was going out on a limb by saying it was a mistake. But I felt I had to say it because I couldn’t figure out why it *wasn’t* a mistake. It looked like the same one they made in the late 1960s and 1970s. It was especially scary because I have a policy: Once I put something out in public, I’m not allowed to delete it. I do this because I believe that it is the only way to establish true credibility.”**

When those forecasts began to materialize, Higgins says, he realized the book was more than a history lesson. It was a framework that could be applied to markets in real time.

> **“That’s when I realized the book was not just an inert summary of the past. It was more like a diagnostic tool that can help people form a clearer picture of the future.”**

Institutional Reach and Long-Term Impact

One of the earliest signals of broader impact came in April 2022, when the Museum of American Finance reached out to Higgins about adapting an article he had written on financier Hetty Green for the museum’s publication, *Financial History*. At the time, Higgins was still completing his manuscript, and the outreach provided early confirmation that the work was resonating beyond traditional publishing circles.

That relationship steadily expanded. Higgins joined the museum’s editorial board in 2024, contributed ten articles to *Financial History* magazine, and became a guest curator for the museum’s new Boston location, which opened on July 1, 2026. One featured exhibit, a timeline chronicling 250 years of American financial and economic history, draws directly from the framework and research established in his book.

> **“It is extraordinarily difficult to commit to a project without knowing how it will turn out. I owe so much to the Museum of American Finance. I originally intended to license the content for one dollar, but I decided to license it for ten dollars because Alexander Hamilton is featured on the front.”**

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In appreciation for the museum's long-standing support, Higgins licensed the material for a single ten-dollar bill featuring Alexander Hamilton.

Beyond the museum, the book has opened additional professional doors. Higgins credits it with strengthening his professional credibility, generating paid speaking engagements, and creating opportunities across education, media, and institutional commentary. Several professors have incorporated the book into university coursework.

The Foundation for a Broader Body of Work

Higgins describes the book as an introductory framework—an outline of 250 years of major financial events and the principles that connect them. Since publication, he has gone deeper on specific themes as new events have unfolded, writing articles and research pieces that expand on topics the book introduced.

> **"The book became the foundation for a much broader body of work. Since publishing it in 2024, I have written dozens of articles, newsletters, and research pieces that expand on many of the themes it introduced. More broadly, it helped establish a platform centered on applying financial history to present-day markets and institutional decision-making."**

He sees the same patterns recurring across railroads, canals, industrials, internet stocks, and now private markets, and the book gives him a shared reference point for those conversations with clients, readers, and institutions alike.

> **"I have come to appreciate that financial history is mostly a story of repetition disguised as innovation to those who remain imprisoned in the present and recent past. The book was designed to help people break free of that intellectual prison. It outlines what the last 235 years looked like, the major events, and some of the fundamental principles that remain just as applicable today as they were to our predecessors."**