Maximum Impact Branding BOOT CAMP

Branding creates a distinct PERCEPTION in the minds of clients and prospects. The ideal perception is one that DISTINGUISHES advisors from competitors. At the end of this 1-day boot camp, participants will be able to state the benefits and values that differentiate them from their competitors. They will leave knowing what visual and verbal modifications, if any, would make their brands stronger.

Agenda

Opening and Introduction

.5 hour – Presented by Marie Swift
Define what a "brand" is, what it does and the importance of consistently delivering on the promise of your brand
Exercise: Audit your existing brand

Developing Your Story

2.5 hours – Presented by Steve Saenz
Developing a message that communicates your core values, philosophy, and process
Exercise: Define Your Core Values
Exercise: Develop Your Investment Philosophy
Exercise: Identify Your Points Of Distinction
Exercise: Draft Your Mission Statement

Lunch *– working lunch to provide an opportunity for participants to finish refine their Mission Statements*

Telling Your Story

2.5 hour – Presented by Christy Barron
Developing aesthetics that communicate your message through the elements of a logo: name, descriptor, tagline, brand-mark
Exercise: Write a tagline
Exercise: Logo preference cards
Exercise: Sketch a brandmark

Questions and Answers

.5 hour –Marie Swift, Steve Saenz and Christy Barron

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Presenters

Marie Swift

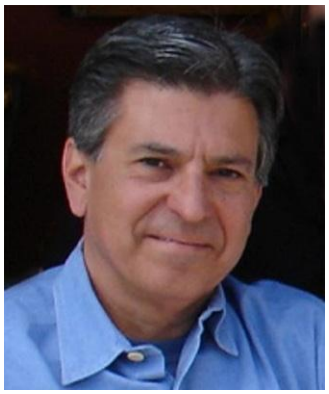
Marie Swift is president and CEO of Impact Communications, a full-service public relations and marketing communications firm serving a select group of independent financial advisors and allied institutions. Impact Communications has two service lines - one for independent financial advisors and one for the institutions that support them.

Client names include TD Ameritrade, Securities America, Lindner Capital Advisors, American Financial Network, Garrett Planning Network, Kinder Institute of Life Planning, FinaMetrica and many more.

Ms. Swift also serves as a top-rated coach for Sourcemedia's AdvisorMax and is frequently published by industry magazines such as Financial Planning, Research, Morningstar Advisor and RIAbiz. Ms. Swift is a popular speaker at industry events, including multiple appearances at FPA national and regional events, NAPFA, Lockwood University and the NFL Players Association.

She is the co-author of *Just Give Me the Answer$: Expert Advisors Address Your Most Pressing Financial Questions* and contributed the marketing chapter to *Garrett's Guide to Financial Planning*. She is the author of the forthcoming book, *Become a Media Magnet: Strategies and Advice for Do-It-Yourself PR.*

Prior to establishing her own firm in 1993, she served as Director of Corporate Communications for Worldwide Investment Network in Irvine, California, where she helped FNIC's then #1 Top Producer attain and maintain that title for five consecutive years. She managed a staff of twenty that supported two dozen successful registered representatives, estate planners and wealth managers.



Steve Saenz

For the past 25 years, Steve has been helping financial advisors evolve to higher value business models. He has trained and coached some of the top advisors in the US and Canada. He has developed a number training programs including:

- Building & Leading High Performance Teams
- Optimize Your Business™
- Turning Clients Into Advocates™

Most recently, Steve established The Copernicus Institute, a dynamic learning community that helps investment professionals achieve their full potential. He is also the host of Copernicus Radio, a weekly show in which he interviews thought leaders from inside and outside of the financial services industry.

Steve began his investment career in 1984 as an account executive with Merrill Lynch. He formed one of the first horizontal teams at ML in 1987 and participated in focus groups that led to ML's first financial planning service.

In 1989, Steve became a regional manager for Merrill Lynch Business Financial Services where he trained financial consultants in the areas of investment management consulting and qualified retirement plans. He was instrumental in the initial growth phase of the ML Consults Program.
In 1991, Steve joined Harris Bretall Sullivan and Smith as managing director for the Southeastern US raising over $300 million mostly in SMA assets. In 1994, Steve formed Paragon Resources. By 1995 he developed The Paragon System™, one of the industry's first practice management coaching programs.

In 2004, Steve formed Copernicus Partners. During this time, he worked on several large-scale projects including the creation of an internal practice management consulting department at a major financial services company.

In 2009, Steve formed the Advisor Solutions Network to meet the complex needs of the 21st Century Wealth Advisor.

Steve is from Miami, FL and graduated from Florida State University with a BS in Finance. He received his CIMA designation in 1991 and successfully completed Level I of the CFA program in 1994. Steve's personal interests include art, cooking, wine, music, travel and web site design. He is an avid volunteer who works on a variety of community projects such as increasing adult literacy, mentoring foster kids and stopping violence against women.

Christy Barron

Impact Communications' graphic design and brand specialist is Christy Barron. She works behind the scene with project managers and vendors to implement marketing strategies.

Christy is a creative professional with over 15 years of experience in visual communications. Before joining this team in 2001, she worked in print production, desktop publishing, graphic design, illustration, and writing instructional materials.

Her wide design experience includes logo and brand development, direct mail, periodical and book publishing, photography direction, and production management. As the primary designer for Impact Communications, her work has earned many awards, including a Print Media Award of Excellence (the highest award possible) in The Communicator Awards 2008 for a brand identity package for one of Impact's independent advisor clients.

Christy also brings value through copy writing and concept development. She operates as thought partner in all aspects of the creative process. In addition, she has extensive experience in instructional design specifically focusing on financial literacy and emotional intelligence content. Her experience includes working with high profile clients such as Cummins, Du Pont, The Federal Reserve Bank of Kansas City, Bath and Body Works, Gerber Foods, and Financial Workshops, LLC.

Beyond skills and experience, Christy approaches her work with a special enthusiasm. She is a practical idealist who brings a great sense of wonder, humor and love of life to all her endeavors. She has a love of adventure and an ability to interact with people. Her quest for experience, wisdom and fun is expressed through all that she touches.