

STAND OUT IN A CROWDED MARKET

BUILD YOUR BRAND. COMMUNICATE MORE EFFECTIVELY. INCREASE SALES.

Does what you say resonate with your market? Would your team say your story “sells” and stands out? We look at hundreds of advisors every week, and we can say with confidence that few of them know how to differentiate themselves with a compelling message.

Developing a message isn't as easy as figuring out what you do well. So what if you are independent? So what if you are fee-based? So what if you “care”? You know these things are important, but do they make you special? Our process of uncovering what makes you different is client-tested and collaborative (after all, we are The Collaborative).

We talk with external folks who know you, we interview internal folks who talk to your market, and we uncover what matters to you and your market. Basically, we help you discover your “secret sauce” and develop materials that help you communicate it. It's an efficient (typically two months long) and reasonably priced process that's proven to yield results!

How does it work?

We offer three different packages designed to meet your needs and budget. Additionally, we provide a number of added-value options you can select from to even further enhance your firm's identity and selling power.

	Bronze Package	Silver Package	Gold Package
Talk to your leadership, staff, and clients to understand who you are	●	●	●
Compile a customized set of ideas for your approval	●	●	●
Recommend how to integrate the new messaging	●	●	●
Develop three “look and feel” visual identity options		●	●
Enhance your pitch(book)!*		●	●
Design a snappy four-page color brochure*		●	●
Work with printers to produce your collateral**		●	●
Develop one-page cut sheets (up to 10)*			●
Create a professional folder for your new materials			●
Write amazing web- and search engine-friendly copy to represent what you do			●
Build your new web site***			●
Provide three months of free website maintenance			●

Optional Services

- Logo refresh/redesign
- Business card design
- Letterhead design
- Advanced web functionality:
 - Client newsletter archives
 - Thought leadership library/Blog
 - Firm news and events
 - Client account system integration



We're ready to help!

Visit us at the-collaborative.com or give us a call at 508-359-8216

*Includes copywriting, visual design, and proofreading services.

**You pay the cost of printing.

***Up to 10 pages; includes basic search engine optimization and contact form.