



ABOUT TACTIBRAND

TactiBrand specializes in helping successful independent advisors and broker/dealers simplify and sustain greater success. Clients we work best with share our passion for achieving clarity, creating credibility and loyalty through branding. Our clients work smarter not harder.

TactiBrand is a branding boutique. We are not a cookie-cutter, one-size-fits-all marketing company. Our focus is delivering high quality, intimate branding and marketing that is different every time. We never intend to become a mass-producing marketing firm; we prefer to be nimble and personal.

We've been helping financial advisors and broker/dealers since 2000 and we are proud of the way our clients continue to be our strongest advocates. There is a reason for that. We work with each client with the clear knowledge that, when we help them achieve their goals in a way that inspires and ignites

confidence, they will in turn eagerly refer like-minded professionals to us so they can share the same experience.

Our "worst kept secret" is that we have a structured process that ensures the path to success is simple and sustainable. We keep it simple by focusing on activities and strategies that drive results – strategies that are straightforward and inexpensive to implement.

Nothing makes us feel better than helping others achieve more. It's the heartfelt gratitude that we receive again and again that inspires us to be leading marketers.

FEEL THE PASSION - ACCELERATE YOUR SUCCESS.

FACTS

- Whether you like it or not, you have a brand, the real question is, “Are you nurturing your brand?”
- Most professionals are failing at the #1 method for attracting ideal clients and maximizing revenue results, referrals.
- It’s not just ‘what’ you do, it’s ‘how’ you do it that demonstrates your expertise and credibility.
- It’s not just ‘how’ you do it either, it’s ‘why’ you do it that really resonates with your ideal clients.
- Over 90% of prospective customers will visit your website as the first step in considering doing business with you.
- The average prospect spends less than 40 seconds on a website before making a decision to stay or move on.
- A high-quality website design markedly improves your ability to convert a prospect into a customer.
- The #1 reason people abandon a website is bad design.
- TactiBrand simplifies your pursuit of success while most marketing firms/consultants inadvertently complicate it.
- Sustainable, cost-effective and results-oriented tactics trump short-term magic marketing bullets, always.

STRATEGIES

TactiBrand provides expertise in key areas to help you:

- Discover and Define Your Uniqueness
- Significantly Improve Your Professional Image
- Ignite Quality Referrals, Duplicate Your Best Clients
- Solidify Your Value with Clearly Articulated Process
- Create Focus with Concise Plan
- Leverage Your Thinking & Avoid Potential Pitfalls

TESTIMONIALS

“TactiBrand overhauled our brand and allowed us to clearly deliver the right message to our clients.”



“TactiBrand’s alignment of planning, branding, marketing and execution is critical to accelerating advisors’ success.”

“Some of the most creative and caring professionals I’ve had the opportunity to work with.”

“TactiBrand’s designs are practical, professional and visually engaging. Their quality is comparable to larger ad agencies but at a fraction of the cost.”

“We chose to partner with them for their innate knowledge of our industry.”

SOLUTIONS & PAYMENT OPTIONS

Deliverables	 Brand & Engage Online	 Brand & Engage Online/Offline	 Brand, Engage & Focus	 Brand, Engage, Focus & Conquer
Brand Discovery (What You Do and Why)	•	•	•	•
Logo & Stationery (or \$1,500 in Extras)	•	•	•	•
Packaged Planning Process (How You Do It)	•	•	•	•
Custom Web Site, CMS, Content Writing & Hosting	•	•	•	•
Brochure (Design & Content)		•		•
Concise Vision Mapping (What You Are Building)			•	•
MindScan Assessment & Review	•	•	•	•
Personal Profile Sheet				•
Personal Blog + 1 st 4 Posts				•
Initial Deposit	\$2,560.00	\$3,360.00	\$3,260.00	\$4,300.00
11 Monthly Payments	\$1,024.78	\$1,345.02	\$1,304.99	\$1,721.31
OR				
4 Equal Monthly Payments	\$3,200.00	\$4,200.00	\$4,075.00	\$5,375.00
EXTRAS:	COST:			
Blog (Personalized, Categorized + 1 st 4 Posts)	\$800-\$2,000			
Whitepapers (Design & Content)	\$2,500 +			
Personal and/or Team Profile Sheet	\$800-\$1,200			
Ad & Banner (Design & Content)	\$500-\$1,750			
Email Memo & Newsletter Templates	\$250-\$500			
Post Card	\$800-\$1,200			
Note Card	\$250-\$500			
Pocket Folder	\$500-\$1,000			
PPT Template	\$250-\$400			

DELIVERABLES & DESCRIPTIONS



BRAND DISCOVERY



We understand that effective branding is a process—not an artistic endeavor. We also know building a brand that will impress ideal prospects and COIs, raise your credibility and professionalism and support your sales process is probably the most important challenges your company faces. So we plan for the big picture, not just a quick fix.

- All About YOU Brand Discovery Exercise + 2 @ 60 min Discovery Meetings
- Brand Summary incl. Tagline, Value Proposition & Ideal Client Profile
- 100% Brand Satisfaction Guarantee



LOGO & STATIONERY



Your logo and stationery are an extension of your brand. They need to be professional, inspiring and simple. A good logo is one that is easy to visualize and supports your message.

- Custom Designed Logo with 3 Samples (Satisfaction Guaranteed)
- Professional Color Palette Selection
- Custom Designed Letterhead, Business Cards (up to 5 personalized), #10 Envelop and 9x12 Envelop



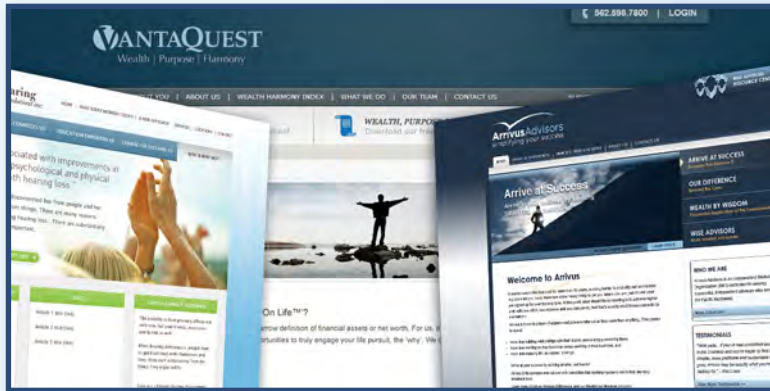
PACKAGED PLANNING PROCESS



As busy professionals we often focus on 'what we do' at the expense of helping people understand 'how we do it'. Articulating how you help your ideal clients succeed demonstrates you have a proven process to duplicate success.

- Planning Process Discovery Exercise + 60 minute Discovery Meeting
- Articulated Process with Marketing Content
- Visual Diagram of Defined Process + 8.5 x 11 Process Sheet (PDF)

DELIVERABLES & DESCRIPTIONS CONTD.



CUSTOM WEB SITE



TactiBrand's proven web design process is time-tested and well-proven. It will result in a site that gives your business the best chance to express "why you do what you do, what you do and how you do it" in a way that is clear and compelling.

- Custom designed site with basic content mgmt capabilities (direct browser access)
- 8-10 pages with intuitive-based tiered navigation + content writing
- Up to 2 contact forms, 4 stock photos with captions
- Social Media & SEO ready sites

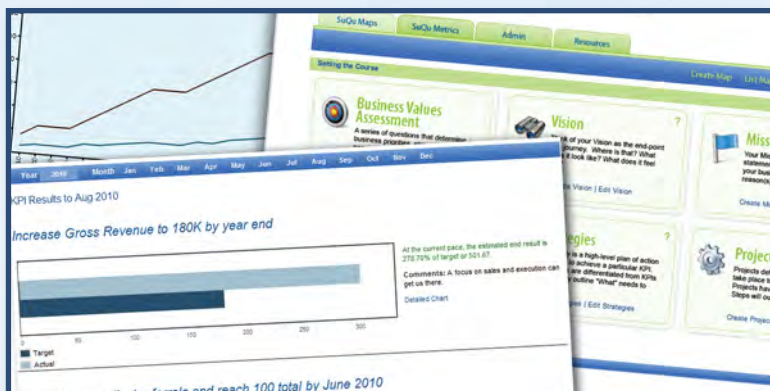


BROCHURE



An attractive and engaging brochure can quickly wow prospective clients and center's of influence. It will immediately convey you're worthy of further consideration. An effective brochure will trigger a call-to-action that guides them along your sales process –to your web site.

- Attractively Designed Brochure with Simple, Cost Effective Layouts
- Consistent Brand Imagery, Message and Flow
- Re-Purposed Brand Content with New Highlights



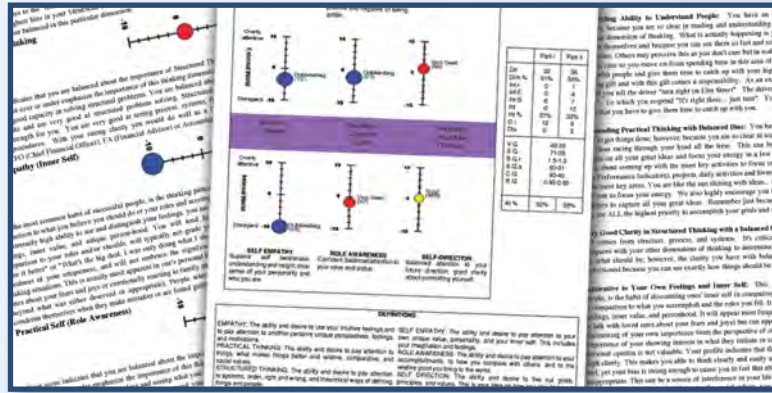
CONCISE VISION MAPPING



Alignment of day-to-day actions with vision and purpose creates sustainable focus and momentum. Just imagine what you could accomplish with a sustainable focus – that's right, day-in, day-out doing only the activities that drive results and accelerate your success.

- MindScan Assessment & Review (45 minute review session)
- 6-8 Vision Mapping Sessions (approx. 50 minutes each)
- Access to Online Mapping & Performance Tracking System (1 Year)

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MINDSCAN ASSESSMENT/REVIEW



Our outcomes are a result of our choices and our choices are the result of our thinking patterns. In order to change our outcomes and circumstances, we have to change our thinking.

- 45 Minute Review Session
- 20 Pg Thinking Overview Report
- New Awareness on “why you do the things you do and don’t do some things you know you should do.”



PERSONAL PROFILE SHEET



If you frequently work with other professionals who are center’s of influence, they’ll likely ask you for a CV or personal profile sheet that they can share with their clients. It’s always best to oblige. We recommend this in conjunction with a brochure and web site.

- Personal Bio including Core Strengths, Credentials, History and Affiliations
- Professionally Photographed Head Shot and/or Body Shot Required.
- Professionally Designed 8.5 x 11 Profile Sheet



PERSONAL BLOG



Personal blogs are mainstream platforms for sharing your thoughts and/or beliefs about your area of expertise. They are also hubs for social media links and content. A blog may not be right for you, especially if you can’t sustain it, but then again, it may just be a perfect fit to add to your new image and brand.

- Personalized Blog w RSS Feed
- Archiving of First 4 Posts
- Integrated CMS, Customized Categories & Recent Posts
- Social Media & SEO ready