Optimize
Wealth Management

It's Time to Elevate Your Brand

Our Branding and Content Marketing Strategy

A strong branding and content marketing strategy is yet another way to set yourself apart and ensure your message hits the mark. Catching the eye of prospective relationships or reinforcing connections with existing clientele are optimized by a personal and profesional brand that resonates. While many consider it to be “the small stuff”, we know that a cohesive strategy is the competitive edge that will take you to the next level.

As branding and content marketing specialists, we’re here to ensure that your best foot is always forward. That starts from the ground up; building your strategy off of itself to leave lasting impressions and present a polished look to your colleagues, connections, and clients.

While implementing your new branding and content marketing strategy, we focus on the five following stages to take your business to the next level:

1. SIGNAGE

2. MARKETING MATERIALS

3. ONLINE PRESENCE

4. PR CAMPAIGN

5. ONGOING CLIENT COMMUNICATIONS

With this integrated approach, your new branding will be consistent across multiple channels and will present a premium look that hits home to your target market and clients alike.

Steps We Take to Optimize Your Branding and Content Marketing:

1. We’ll Update your New Signage
2. We’ll Design your Marketing Materials
3. We’ll Amplify your Online Presence
4. We’ll Launch your PR Campaign
5. We’ll Handle your Ongoing Communications

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Step 1

We'll Update Your Exterior

EXTERIOR SAMPLE 1

Storefront Awning Sign
Blue with white writing

Planner Name and Title
White vinyl on glass

Hours of Operation Sign
White vinyl on glass

EXTERIOR SAMPLE 2

Storefront Direct Sign
White vinyl on Blue

Planner Name and Title
White vinyl on glass

Hours of Operation Sign
White vinyl on glass

Step 2

We'll Update Your Interior as well

INTERIOR SAMPLE 1

Metal Wall Sign
Brushed Metal
Floating Letters
Direct Mounting

INTERIOR SAMPLE 2

Metal Wall Sign
Brushed Metal
Floating Letters
Direct Mounting

Step 2

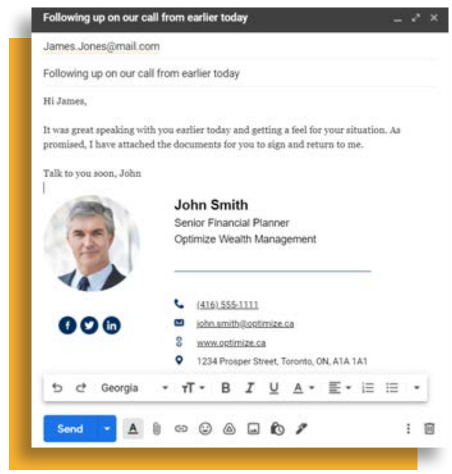
We’ll Design Your Marketing Materials

TAILORED BUSINESS CARDS

- Classic design stands out
- Premium materials maintain the luxury feel
- Showcase your credentials

FUNCTIONAL EMAIL SIGNATURE

- A “digital business card”
- Elevates your electronic communications
- Integrated links for a simpler client experience

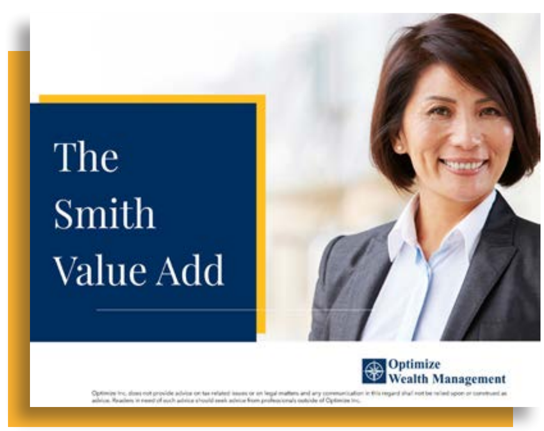


ALL NEW LETTERHEAD

- Upgrade your professional communications
- Seamlessly matches within your branded materials

PERSONALIZED BROCHURE

- Puts your business on display
- Delivers messaging from a higher level
- Another tool in your marketing strategy

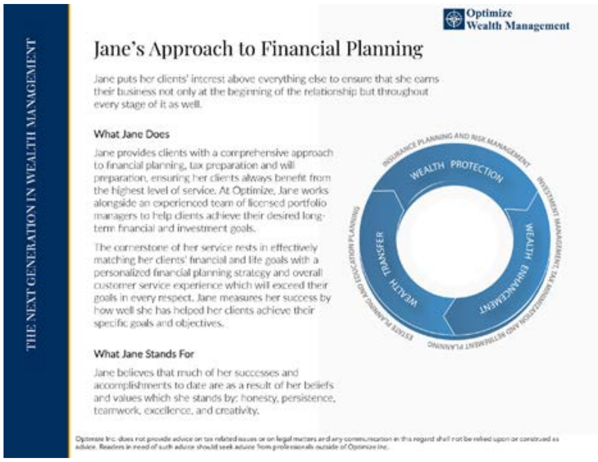


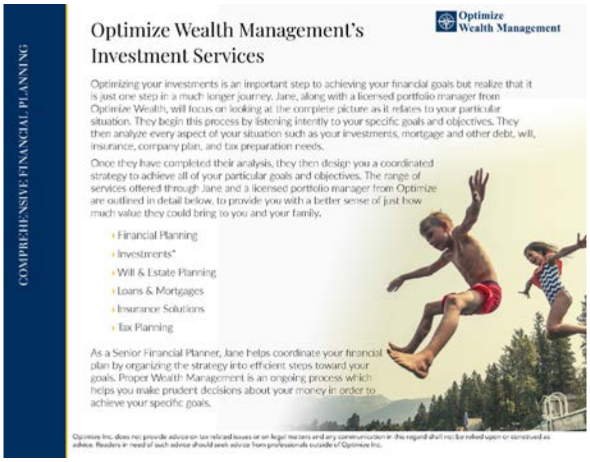
Step 2

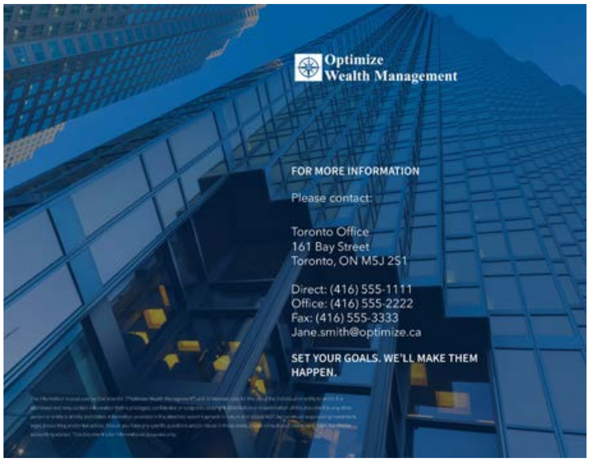
We’ll Design Your Marketing Materials

Stand Out with a Brochure All About You.

Our design team will create your very own personalized brochure to market yourself in new ways.

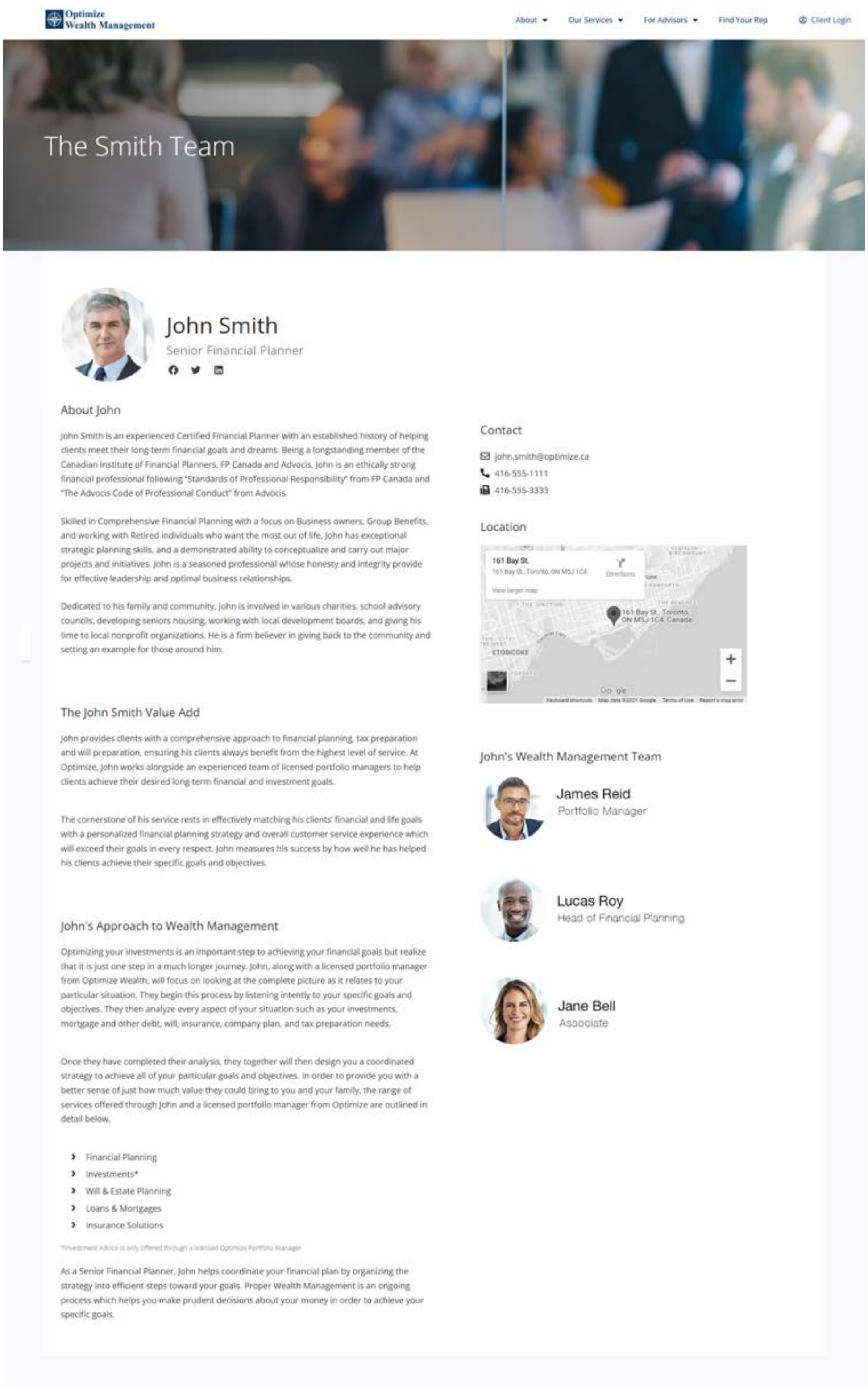






Step 3

We'll Amplify Your Online Presence



Take the digital world by storm.

In this day and age it's increasingly important your online branding is on point.

We start by building you a customized website.
Your online "home base" with direct links for contacting you, access to the client portal, and a place to showcase yourself and your team.

We don't stop there.
In addition to your website our social media team works with your social media to establish a well-designed and polished look.

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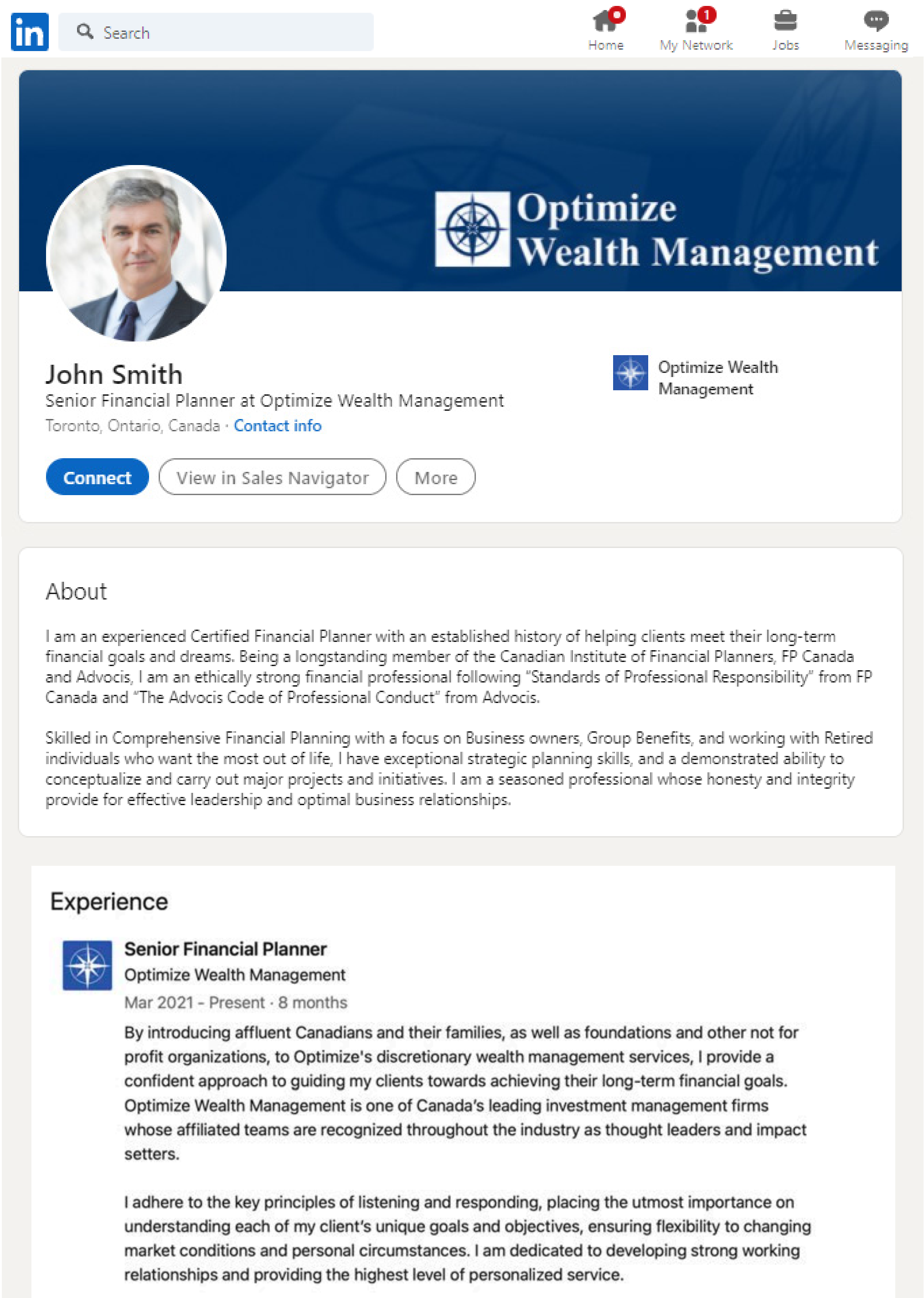
Step 3

We'll Amplify Your Online Presence

Prepare Your Social Media to Conquer the Digital Wold.

Our social media team will optimize your profiles to elevate your online presence.



Step 4

We’ll Launch Your PR Campaign

Time to Put it in Action

Once we have established your branding, it’s time to kick off your marketing strategy. We like to do this with a press release announcing your move to Optimize so you make a splash and catch attention right out of the gate.

Optimize Wealth Management

PRESS RELEASE

FOR IMMEDIATE RELEASE
March 21, 2021

Optimize Wealth Welcomes Jane Smith and its newest office in Toronto, Ontario, furthering its Nationwide Expansion

TORONTO, Ontario - Optimize Wealth Management announced the recent addition of Senior Financial Planner, Jane Smith to the firm. Jane has extensive experience helping families in the Toronto region for over thirty years.

“We are pleased to have another highly skilled and experienced planner like Jane join the Optimize team. We are confident that she will help us continue to provide a premier level of service to our clients,” said Matthew McGrath, Head of Advisory Channel and Corporate Development at Optimize Wealth.

At Optimize Wealth’s newest office in Toronto, Jane will provide clients with a comprehensive approach to financial planning, benefiting from the support of an experienced team of licensed portfolio managers to help achieve clients’ long-term financial goals.

“I’m thrilled to be joining Optimize,” said Jane Smith. “The move ensures that my clients will benefit from robust portfolio management and a multi-family office platform from one of Canada’s leading portfolio management firms”.

About Jane Smith

Jane Smith is an experienced Certified Financial Planner with an established history of helping clients meet their long-term financial goals and dreams. Being a longstanding member of the Canadian Institute of Financial Planners, FP Canada and Advocis, Jane is an ethically strong financial professional following “Standards of Professional Responsibility” from FP Canada and “The Advocis Code of Professional Conduct” from Advocis.

Skilled in Comprehensive Financial Planning with a focus on Business owners, Group Benefits, and working with Retired individuals who want the most out of life, Jane has exceptional strategic planning skills, and a demonstrated ability to conceptualize and carry out major projects and initiatives. Jane is a seasoned professional whose honesty and integrity provide for effective leadership and optimal business relationships.

Dedicated to her family and community, Jane is involved in various charities, school advisory councils, developing seniors housing, working with local development boards, and giving her time to local non-profit organizations. She is a firm believer in giving back to the community and setting an example for those around her.

Contact:

Jane Smith
Senior Financial Planner
1234 Prosper Street,
Toronto, ON, A1A 1A1
(P) (416) 555-1111

Step 4

We'll Launch Your PR Campaign

Start Spreading the News

The buzz doesn't stop once we've launched your press release. Our social media team leverages our social media following to disseminate the release to thousands across the country. This puts you in the spotlight across the financial industry and drives new traffic to your social media and website. As more and more people interact, your reach continues to expand into new networks.

Step 5

We'll Handle Your Ongoing Communications

Quarterly e-Newsletters

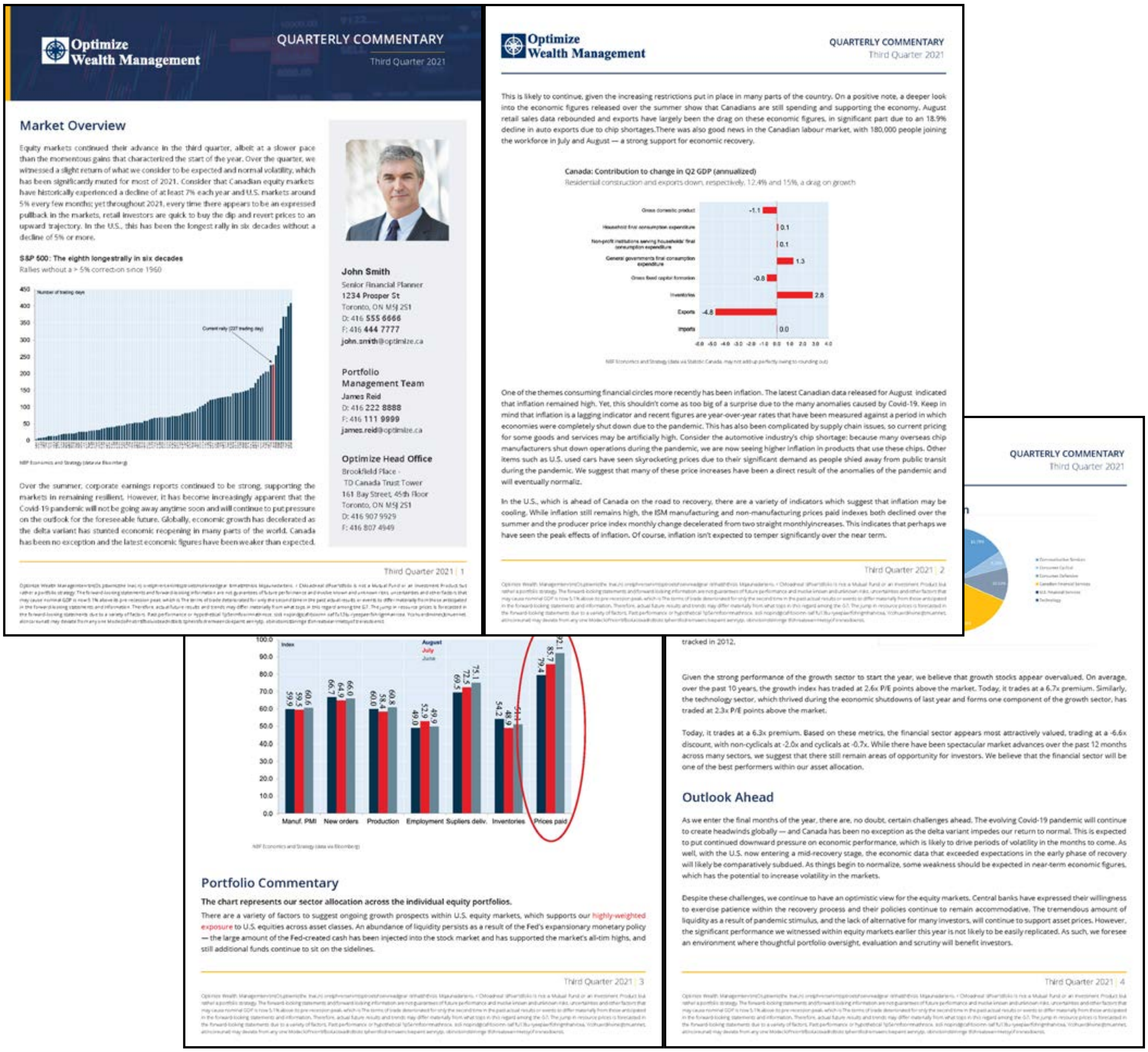
Delivering high-end regular content to your clients has never been easier. We prepare and send out quarterly e-newsletters for you so you can keep clients in the loop and add a nice personal touch.

Step 5

We'll Handle Your Ongoing Communications

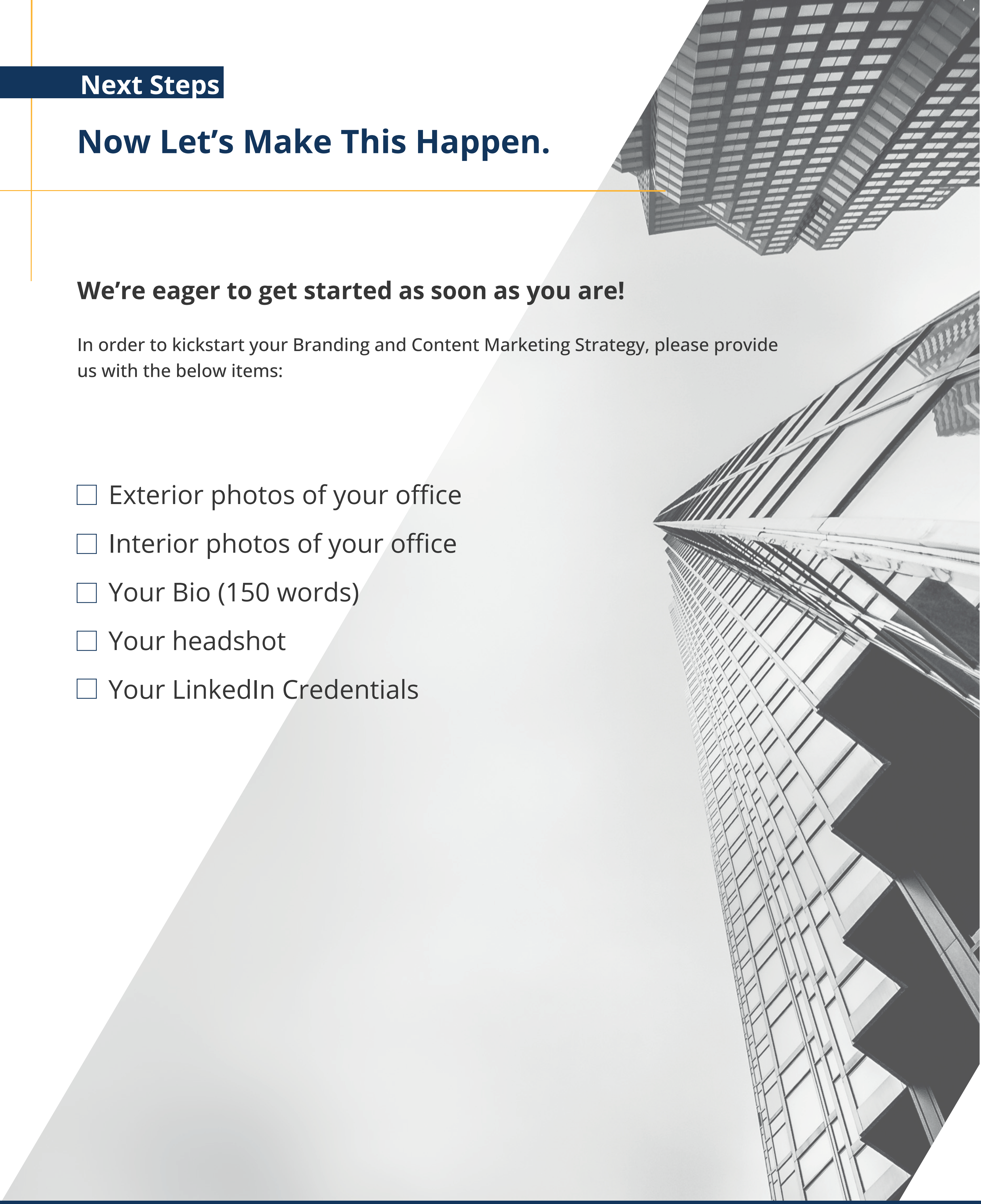
Quarterly Market Commentary

We also prepare and send out for you a quarterly market commentary which brings a new dimension to your ongoing communications strategy with clients and prospects.



Next Steps

Now Let's Make This Happen.



We're eager to get started as soon as you are!

In order to kickstart your Branding and Content Marketing Strategy, please provide us with the below items:

- ☐ Exterior photos of your office
- ☐ Interior photos of your office
- ☐ Your Bio (150 words)
- ☐ Your headshot
- ☐ Your LinkedIn Credentials

Are You Ready to Take Your Branding to the **Next Level?**

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