



**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 professional 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



Optimize  
Wealth Management

## 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



Get the Most Out of Your Money™

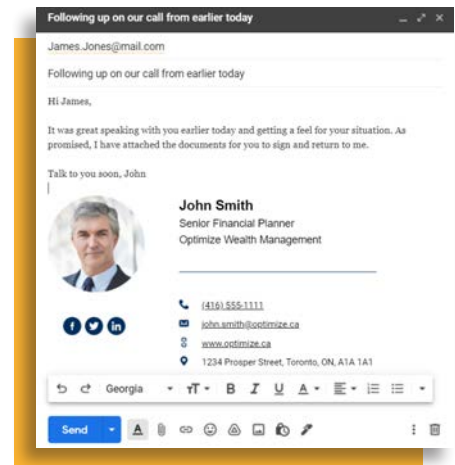
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Senior Financial Planner

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### 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



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### 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.



Optimize Inc. does not provide advice on tax related issues or on legal matters and any communication in this regard shall not be relied upon or construed as advice. Readers in need of such advice should seek advice from professionals outside of Optimize Inc.

THE NEXT GENERATION IN WEALTH MANAGEMENT

### 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 nonprofit organizations. She is a firm believer in giving back to the community and setting an example for those around her.

**"My goal is to use honesty and integrity to help you reach your desired goals."**

**Jane Smith**

COMPREHENSIVE FINANCIAL PLANNING

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THE NEXT GENERATION IN WEALTH MANAGEMENT

### Jane's Approach to Financial Planning

Jane puts her clients' interest above everything else to ensure that she earns their business not only at the beginning of the relationship but throughout every stage of it as well.

**What Jane Does**

Jane provides clients with a comprehensive approach to financial planning, tax preparation and will preparation, ensuring her clients always benefit from the highest level of service. At Optimize, Jane works alongside an experienced team of licensed portfolio managers to help clients achieve their desired long-term financial and investment goals.

The cornerstone of her service rests in effectively matching her clients' financial and life goals with a personalized financial planning strategy and overall customer service experience which will exceed their goals in every respect. Jane measures her success by how well she has helped her clients achieve their specific goals and objectives.

**What Jane Stands For**

Jane believes that much of her successes and accomplishments to date are as a result of her beliefs and values which she stands by: tenacity, persistence, teamwork, excellence, and creativity.

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COMPREHENSIVE FINANCIAL PLANNING

### Optimize Wealth Management's Investment Services

Optimizing your investments is an important step to achieving your financial goals but realize that it is just one step in a much longer journey. Jane, along with a licensed portfolio manager from Optimize Wealth, will focus on looking at the complete picture as it relates to your particular situation. They begin this process by listening intently to your specific goals and objectives. They then analyze every aspect of your situation such as your investments, mortgage and other debt, will, insurance, company plan, and tax preparation needs.

Once they have completed their analysis, they then design you a coordinated strategy to achieve all of your particular goals and objectives. The range of services offered through Jane and a licensed portfolio manager from Optimize are outlined in detail below, to provide you with a better sense of just how much value they could bring to you and your family.

- Financial Planning
- Investments\*
- Will & Estate Planning
- Loans & Mortgages
- Insurance Solutions
- Tax Planning

As a Senior Financial Planner, Jane helps coordinate your financial plan by organizing the strategy into efficient steps toward your goals. Proper Wealth Management is an ongoing process which helps you make prudent decisions about your money in order to achieve your specific goals.

COMPREHENSIVE FINANCIAL PLANNING

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**FOR MORE INFORMATION**

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**SET YOUR GOALS. WE'LL MAKE THEM HAPPEN.**

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## Step 3

# We'll Amplify Your Online Presence



**John Smith**  
Senior Financial Planner

### About John

John 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, John 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, John has exceptional strategic planning skills, and a demonstrated ability to conceptualize and carry out major projects and initiatives. John is a seasoned professional whose honesty and integrity provide for effective leadership and optimal business relationships.

Dedicated to his family and community, John is involved in various charities, school advisory councils, developing seniors housing, working with local development boards, and giving his time to local nonprofit organizations. He is a firm believer in giving back to the community and setting an example for those around him.

### The John Smith Value Add

John provides clients with a comprehensive approach to financial planning, tax preparation and will preparation, ensuring his clients always benefit from the highest level of service. At Optimize, John works alongside an experienced team of licensed portfolio managers to help clients achieve their desired long-term financial and investment goals.

The cornerstone of his service rests in effectively matching his clients' financial and life goals with a personalized financial planning strategy and overall customer service experience which will exceed their goals in every respect. John measures his success by how well he has helped his clients achieve their specific goals and objectives.

### John's Approach to Wealth Management

Optimizing your investments is an important step to achieving your financial goals but realize that it is just one step in a much longer journey. John, along with a licensed portfolio manager from Optimize Wealth, will focus on looking at the complete picture as it relates to your particular situation. They begin this process by listening intently to your specific goals and objectives. They then analyze every aspect of your situation such as your investments, mortgage and other debt, will, insurance, company plan, and tax preparation needs.

Once they have completed their analysis, they together will then design you a coordinated strategy to achieve all of your particular goals and objectives. In order to provide you with a better sense of just how much value they could bring to you and your family, the range of services offered through John and a licensed portfolio manager from Optimize are outlined in detail below.

- Financial Planning
- Investments\*
- Will & Estate Planning
- Loans & Mortgages
- Insurance Solutions

\*Investment Advice is only offered through a licensed Optimize Portfolio Manager

As a Senior Financial Planner, John helps coordinate your financial plan by organizing the strategy into efficient steps toward your goals. Proper Wealth Management is an ongoing process which helps you make prudent decisions about your money in order to achieve your specific goals.

### Contact

✉ john.smith@optimize.ca  
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📠 416-555-3333

### Location



### John's Wealth Management Team



**James Reid**  
Portfolio Manager



**Lucas Roy**  
Head of Financial Planning



**Jane Bell**  
Associate

**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.



**Optimize  
Wealth Management**

## Step 3

# We'll Amplify Your Online Presence

## Prepare Your Social Media to Conquer the Digital World.

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

The image shows a LinkedIn profile for John Smith, a Senior Financial Planner at Optimize Wealth Management. The profile includes a search bar, navigation icons for Home, My Network, Jobs, and Messaging, and a header with a profile picture and the company logo. The 'About' section describes his experience as a Certified Financial Planner, and the 'Experience' section details his role at Optimize Wealth Management from March 2021 to the present.

**John Smith**  
Senior Financial Planner at Optimize Wealth Management  
Toronto, Ontario, Canada · [Contact info](#)


[Connect](#) [View in Sales Navigator](#) [More](#)

### About

I am 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, I am 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, I have exceptional strategic planning skills, and a demonstrated ability to conceptualize and carry out major projects and initiatives. I am a seasoned professional whose honesty and integrity provide for effective leadership and optimal business relationships.

### Experience

 **Senior Financial Planner**  
Optimize Wealth Management  
Mar 2021 - Present · 8 months

By introducing affluent Canadians and their families, as well as foundations and other not for profit organizations, to Optimize's discretionary wealth management services, I provide a confident approach to guiding my clients towards achieving their long-term financial goals. Optimize Wealth Management is one of Canada's leading investment management firms whose affiliated teams are recognized throughout the industry as thought leaders and impact setters.

I adhere to the key principles of listening and responding, placing the utmost importance on understanding each of my client's unique goals and objectives, ensuring flexibility to changing market conditions and personal circumstances. I am dedicated to developing strong working relationships and providing the highest level of personalized service.



# 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.



### 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.

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## 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.



**Optimize Wealth Management**  
7,618 followers  
2w • Edited •

Very pleased to welcome Jane Smith to the Optimize Team at our newest office in Toronto, Ontario! We're thrilled to have another highly skilled professional like Jane join our family, and to help us continue to provide a premier level of service to clients.

*Welcome to Optimize*  
**Jane Smith**  
*Toronto Office*

**Optimize Wealth Management**

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

optimize.ca • 1 min read







# 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.



**QUARTERLY COMMENTARY**  
Third Quarter 2021

### Market Overview

Equity markets continued their advance in the third quarter, albeit at a slower pace than the tremendous gains that characterized the start of the year. Over the quarter, we witnessed a slight return of what we consider to be expected and normal volatility, which has been significantly muted for most of 2021. Consider that Canadian equity markets have historically experienced a decline of at least 7% each year and U.S. markets around 5% every few months yet throughout 2021, every time there appears to be an expressed pathback in the markets, retail investors are quick to buy the dip and revert prices to an upward trajectory. In the U.S., this has been the longest rally in six decades without a decline of 5% or more.

**S&P 500: The eighth longest rally in six decades**  
(Rallies without a +5% correction since 1969)



Over the summer, corporate earnings reports continued to be strong, supporting the markets in remaining resilient. However, it has become increasingly apparent that the Covid-19 pandemic will not be going away anytime soon and will continue to put pressure on the outlook for the foreseeable future. Globally, economic growth has decelerated as the delta variant has stunted economic reopening in many parts of the world. Canada has been no exception and the latest economic figures have been weaker than expected.



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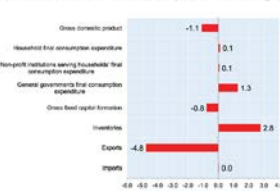
Third Quarter 2021 | 1



**QUARTERLY COMMENTARY**  
Third Quarter 2021

This is likely to continue, given the increasing restrictions put in place in many parts of the country. On a positive note, a deeper look into the economic figures released over the summer show that Canadians are still spending and supporting the economy. August retail sales data rebounded and exports have largely been the drag on these economic figures, in significant part due to an 18.9% decline in auto exports due to chip shortages. There was also good news in the Canadian labour market, with 180,000 people joining the workforce in July and August — a strong support for economic recovery.

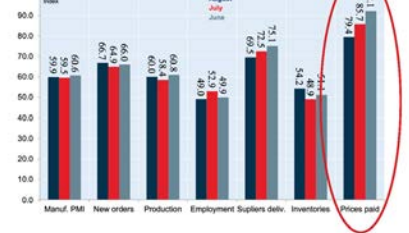
**Canada: Contribution to change in Q2 GDP (annualized)**  
Residential construction and exports down, respectively, 12.4% and 15%, a drag on growth



One of the themes consuming financial circles more recently has been inflation. The latest Canadian data released for August indicated that inflation remained high. Yet, this shouldn't come as too big of a surprise due to the many anomalies caused by Covid-19. Keep in mind that inflation is a lagging indicator and recent figures are based on year-over-year rates that have been measured against a period in which economies were completely shut down due to the pandemic. This has also been complicated by supply chain issues, so current pricing for some goods and services may be artificially high. Consider the automotive industry's chip shortage: because many overseas chip manufacturers shut down operations during the pandemic, we are now seeing higher inflation in products that use these chips. Other items such as U.S. used cars have seen skyrocketing prices due to their significant demand as people shied away from public transit during the pandemic. We suggest that many of these price increases have been a direct result of the anomalies of the pandemic and will eventually normalize.

In the U.S., which is ahead of Canada on the road to recovery, there are a variety of indicators which suggest that inflation may be cooling. While inflation still remains high, the ISM manufacturing and non-manufacturing prices paid indexes both declined over the summer and the producer price index monthly change decelerated from two straight monthly increases. This indicates that perhaps we have seen the peak effects of inflation. Of course, inflation isn't expected to temper significantly over the near term.

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### Portfolio Commentary

The chart represents our sector allocation across the individual equity portfolios.

There are a variety of factors to suggest ongoing growth prospects within U.S. equity markets, which supports our **highly-weighted** exposure to U.S. equities across asset classes. An abundance of liquidity persists as a result of the Fed's expansionary monetary policy — the large amounts of the Fed-created cash has been injected into the stock market and has supported the market's climb high, and still additional funds continue to sit on the sidelines.

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tracked in 2012.

Given the strong performance of the growth sector to start the year, we believe that growth stocks appear overvalued. On average, over the past 10 years, the growth index has traded at 2.6x P/E points above the market. Today, it trades at a 6.7x premium. Similarly, the technology sector, which thrived during the economic shutdowns of last year and forms one component of the growth sector, has traded at 2.3x P/E points above the market.

Today, it trades at a 6.3x premium. Based on these metrics, the financial sector appears most attractively valued, trading at a 4.6x discount, with non-cyclicals at 2.6x and cyclicals at 0.7x. While there have been spectacular market advances over the past 12 months across many sectors, we suggest that there still remain areas of opportunity for investors. We believe that the financial sector will be one of the best performers within our asset allocation.

### Outlook Ahead

As we enter the final months of the year, there are, no doubt, certain challenges ahead. The evolving Covid-19 pandemic will continue to create headwinds globally — and Canada has been no exception as the delta variant impedes our return to normal. This is expected to put continued downward pressure on economic performance, which is likely to drive periods of volatility in the months to come. As well, with the U.S. now entering a mid-recovery stage, the economic data that exceeded expectations in the early phase of recovery will likely be comparatively subdued. As things begin to normalize, some weakness should be expected in near-term economic figures, which has the potential to increase volatility in the markets.

Despite these challenges, we continue to have an optimistic view for the equity markets. Central banks have expressed their willingness to create patience within the recovery process and their policies continue to remain accommodative. The tremendous amount of liquidity as a result of pandemic stimulus, and the lack of alternative for many investors, will continue to support asset prices. However, the significant performance we witnessed with equity markets earlier this year is not likely to be easily replicated. As such, we foresee an environment where thoughtful portfolio oversight, evaluation and scrutiny will benefit investors.

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## 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?**

## Head Office

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