

BRANDBRIEF

FOR

RITA PATEL

FEBRUARY 5, 2021



CURRENT SITUATION

Rita Patel launched her career as an agent at New York Life Insurance Company in 2020 and has been successfully providing clients with a variety of financial products including retirement planning, tax diversification strategies and life insurance.

She is ready to build an autonomous Brave Brand by welding her financial expertise with her personal experience of being a mother, wife, divorcee, and an immigrant. Her immediate objective is to reach the clients who are in an acute need of her advice, but often defy it, and to also create a brand message that fully supports the reason for her existence as a financial advisor in the first place.

Rita needs to implement at least two of the three most important angles of brave branding in order to achieve her goals, and those angles are:

- lean heavily on her life's work and use that to fuel trust and credibility
- laser focus on a niche that loves her personal flavor of audacity and is ready to pay for it
- launch her own branded process or a product

FINDINGS & RECOMMENDATIONS

1. MAIN BRAND STRATEGY APPROACH

Based on our interview I am proposing that you build a brand that centers around you and your personal journey through life, from marriage and divorce to financial independence. Your career at NY Life Insurance might be just starting, but you are the undisputed “down-in-the-trenches” expert of post-divorce fright. Not only that, but you are the expert of getting out of it. Your absolute best client match is women and wives whose financial avoidance has become a recurring narrative throughout life, often passed down from previous generations. You have limitation as far as branding your process with your own name right now, but it is something that you should consider within the next 2 years.

Let's look at the aforementioned three angles of brand bravery up close:

A) Use your life's work to fuel trust and credibility

Rita, you have made it your mission to create a thriving family and raise awesome human beings as sons. Each member of the family went on to create their own epic story and make a positive difference in the world (including your ex-husband). You ran this family like a CEO and it's the biggest asset you've ever built, with human tears, sweat and blood. And now is time for you to run your own company (in the very same unapologetic, no BS way) so other women can benefit from the victories and mistakes you've made.

Because, let's face it (and the statistics back it up) - majority of women defer major financial and investment decisions to their spouses.

A UBS Global Wealth Management survey of over 1,800 married men and women (including 50 same-sex married women) recently found that nearly half of the women — led by Millenni-

als - rely on their partners for all financial decisions.

Luckily, you are here to change that!

Because you know the risks inherent to burying your head in the sand — things like getting a false sense of security and scrambling to piece together your finances when a spouse is no longer around. Imagine what your personal story, when told with conviction, can do for other women who are experiencing the same.

Your journey will be the wake up call for all these women who, even if not divorced, feel out of touch with their finances, and simply don't know where to start. If they're that lost today, think about how lost they'd feel later if and when they really need to manage their investments, life insurance and will with the partner out of the picture. I am stressing this onto you just in case you had any doubt whether you're the perfect person for the job. **YOU ARE! :)** Not only you've lived it, but you have the financial training to change the path for so many clients who are looking for someone exactly like you in this very moment!

B) Laser focus on a niche

PRIMARY:

Women between 30-60 who feel completely out of touch with their finances and are seeking to:

- level the playing field with their partner
- need the financial education necessary to step into any future relationship
- are in the process of divorce and need advice on protecting their assets

SECONDARY:

Wealthy couples, lower end having \$250,000 in investable assets, who are seeking trustworthy advice on how to get motivated to embrace their finances and how to both be active participants in them

C) Invent your own process and brand it

In accord with your goal to be the sought after and go-to personal financial expert for women, you will need to build as much authority and credibility as you can, starting now :)

One way to gain authority in your profession is to brand a process that is uniquely yours. You could have a methodology that teaches women how to “get back in the game” by first encouraging them to go to the “dark place”. Since you've been there, this is where you can be most helpful. This process could adopt a myriad of forms and names (e.g. *Change with Rita* or something in that vein) but my advice is to be brave and start talking about the real psychological, mental, and emotional barriers that prevent us from taking action around money. Get personal and vulnerable, and women will follow you.

After all, you have the dream of traveling and empowering women all around the world within five years :) So start taking action now and build that audience.

2. ADDITIONAL STEPS

• MESSAGING

I know that you're impatient to get out there in front of your ideal client with an authentic message, so I'm going to give you a pitch formula that you can make yours. Let's look at some elements that will build your positioning statement (elevator pitch):

1. IDEAL CLIENT

Women who struggle to be active participants in their finances (are frustrated by the short-term nature of the relationship between financial advisors and clients) and are looking to defeat the dread of depending on others once and for all, so they can focus on being their best selves in the present moment.

2. BRAND VOICE

trusted, strategic, genuine, expert, vulnerable and strong

3. MAIN OFFER:

- main service: financial literacy & personal finance advise on investments, taxes & insurance
- client's problem/pain point: out of touch with finances, fear of depending on others
- main benefit: freeing you from the intimidation around money and finance, so you can take on life with joy, responsibility and the freedom to be yourself
- what makes you better: you've lived it and now can prevent others from it

Here is a positioning statement based on the above elements:

"I empower women who are looking to defeat the dread of depending on others with proven financial strategies, tools, and mindset that the top 5% use to maximize wealth, keep it and protect it."

Here's a possible tagline that can get your client's attention:

"Face the "what ifs" and you might be motivated to embrace your finances."

"You don't need "permission" to know how money's getting managed. Start having your own back!"

• LOGO OR MAIN DESIGN ELEMENT

As the woman who is feeling empowered to conquer it all and is ready to soar to the top where the phoenix flies, I envision the phoenix being your special mark (a metaphor gift from your son :) next to a stylish typographic treatment of your name.

• SUGGESTED SITE MAP FOR A WEB PAGE

1. HOMEPAGE

Large main image that references your ideal customers (or even better, your photo), with copy that speaks directly to them with your brand's authentic voice, with a call to action to schedule a call.

2. HOW IT WORKS

- High level explanation of what working with you in the long term looks like and all the risks you are mitigating when they hire you
- Call to action to schedule a call to see if you are a good fit

3. BLOG (to be incorporated later)

You should start a blog that discusses/dissects the intersection of money and relationships (that is where your brand voice will shine and you can give examples from your personal life which will make you human and approachable).

A few blog topics to consider:

- Why we should normalize prenups
- Priorities and \$ strategies for newly married couples/divorced women
- Wives: stop leaving money management to your spouse

4. ABOUT

About you, but still about the client. Your about page should explain why you do this and how that is a benefit to the client, and how your background gives you a unique skill set to help women with their financial decisions.

5. CONTACT

MOVING FORWARD

FIREBRAND: \$6,950

Based on our findings in this brief (and any edits we make together), we will build a Brave Brand with an authentic and charismatic voice that will set you apart from your competition, draw the clients who love your personal flavor of audacity and expertise and are willing to pay for it. With this brand you will have everything you need to fuel word of mouth and share your offerings as soon as possible.

If you hire us, we will execute the following:

- Develop a Brave Brand message and copy that will both influence conversion of clients on your website, and how you discuss and describe your offers
- Design your brand that portrays you as a trusted advisor, but with a bold and personable approach
- Craft all homepage and website copy, including taglines and positioning statement
- Design, build and launch a 3 page website on WordPress based on the sitemap above
- Design brand identity materials: business cards, social media icons and headers and branded template for documents you deliver to your clients
- WordPress training on how to update and edit your site
- Launch a new website on your url and hosting service if needed
- Consult on how to move forward to get your first clients