

Creating a Trusted Brand & Unique Selling Proposition for Financial Industry Professionals



Brand Messaging, Assets, Exposure, & Relationships

Your personal brand is more than your car, hairstyle, and clothes.

Your business brand is more than your logo, color scheme, and font.

People today are more focused on your brand differentiators, values, and messaging and with their overall experience with your company and/or you personally. “The power of a brand lies in what customers have learned, felt, seen, and heard about the brand,” according to Keller’s Brand Equity Model.

Framework for Brand Building

Building a business or personal brand requires: cohesive messaging, developing assets aligned with your brand, exposing your message to your target audience, and deepening the brand experience through ongoing relationship-building.



Sales Funnel Relation to Brand-building

Brand development is an investment into an asset. Strengthening your brand can generate ongoing returns and have monetary value because it represents potential revenue. <https://www.investopedia.com/ask/answers/012815/what-difference-between-tangible-and-intangible-assets.asp>

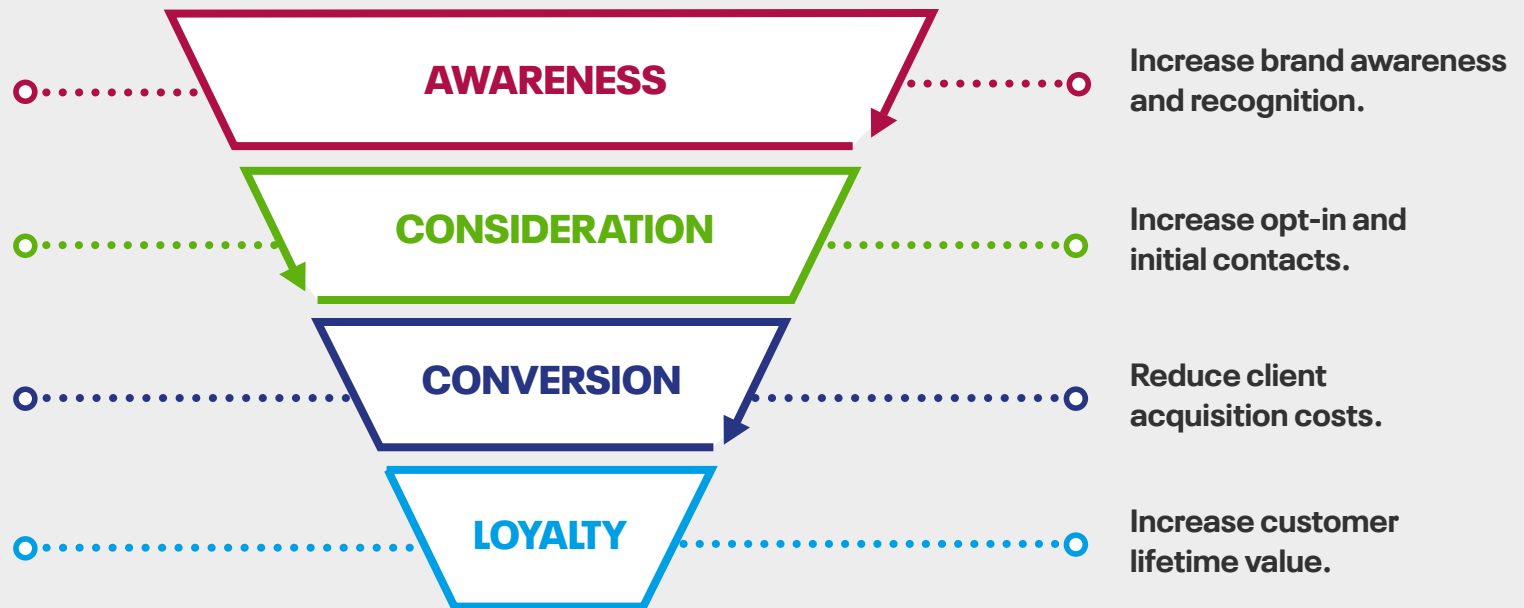
Building your brand value is a cornerstone of any conversion rate optimization (CRO) strategy and should precede marketing. Brand value provides multiple benefits, from top-of-funnel communications through client acquisition.

Greater reach and engagement opportunities.

Shorten client conversion time.

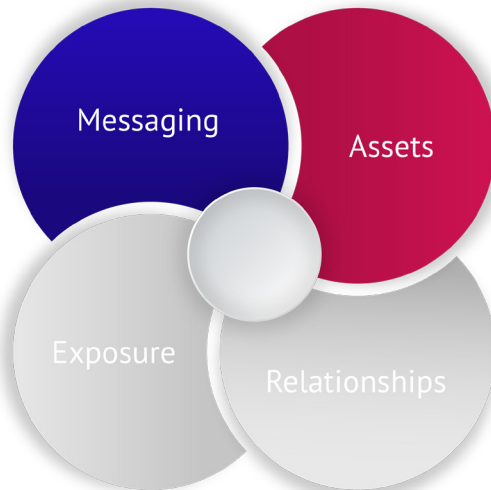
Increase client conversion ratios.

Lead to greater client loyalty and referrals.



Meet Corporate Social Responsibility (CSR) Objectives, Earn Professional Development & Volunteer Hours, Team-building and Alignment with Cause, Professional Network Development, Build Community Legacy.

Overview of Solutions Provided



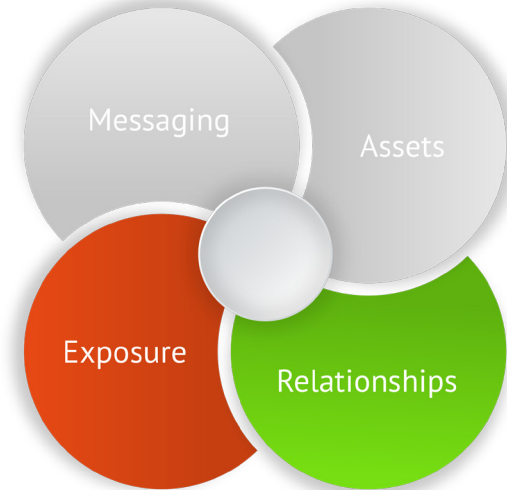
Brand Messaging & Assets

- Community Leadership Positioning
- Education-based Engagement



Brand Assets & Exposure

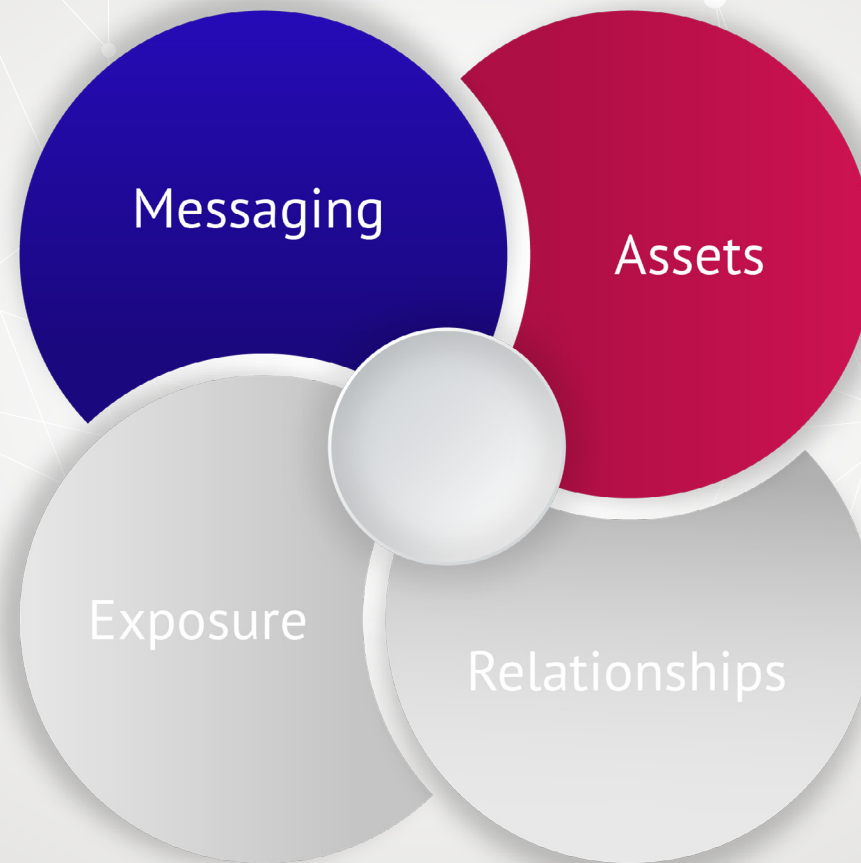
- Online Publicity & Visibility
- Brand Activation Campaigns



Brand Exposure & Relationships

- Marketing & Advertising
- Communications & Client Nurturing

Brand Messaging & Assets



Business benefits to cause-based alignment:

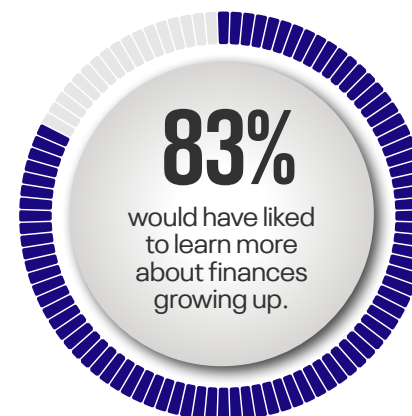
Community Leadership & Service

Aligning your brand with a leadership role in financial wellness and financial literacy demonstrates that you care about your neighbors and are leading the charge to help your community work toward greater financial security.

Your participation helps us distribute financial literacy programming to the communities you serve and raise awareness about the importance of financial education. In turn, your generous sponsorship aligns your brand with community service, leadership, and the financial wellness movement.



Financial literacy is a cause that the majority of the public supports:



Education-based Engagement

People want to make informed financial decisions and hold educators in high regard. Including education-based content in your brand and marketing strategy offers extensive benefits that range from improved brand messaging and prospect development to lead and client nurturing.



Customer education found to be the strongest determinant of client loyalty.



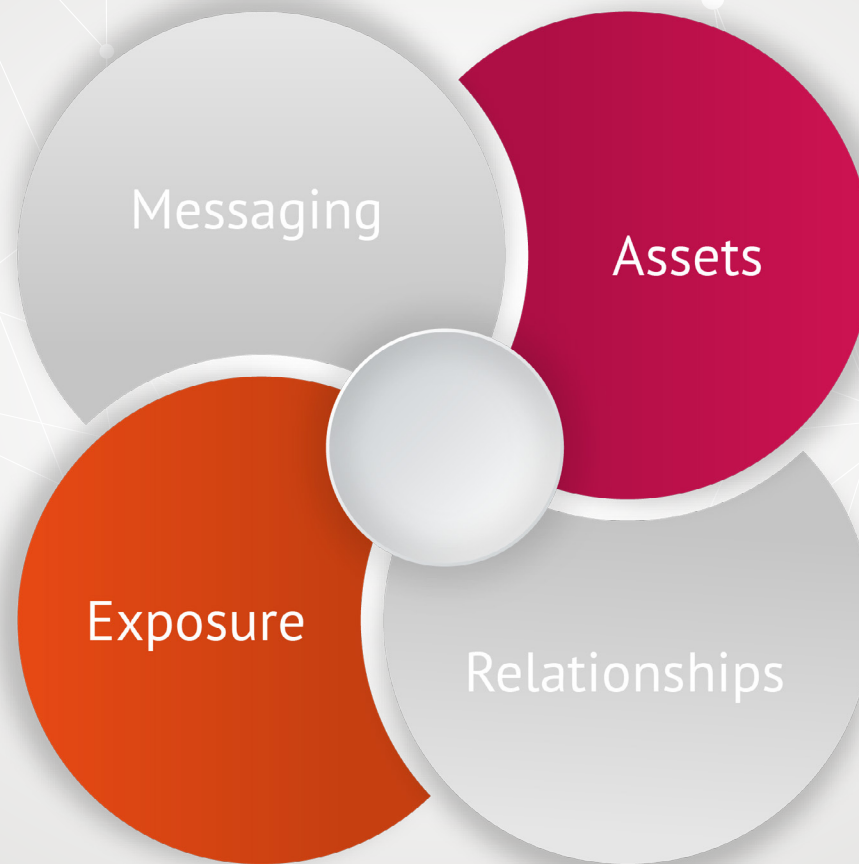
81%

Households said that if their financial institutions offered a financial education program they would find it "extremely" or "somewhat" valuable.

89%

Marketers at leading financial institutions were asked to include financial education in their marketing strategy.

Brand Assets & Exposure

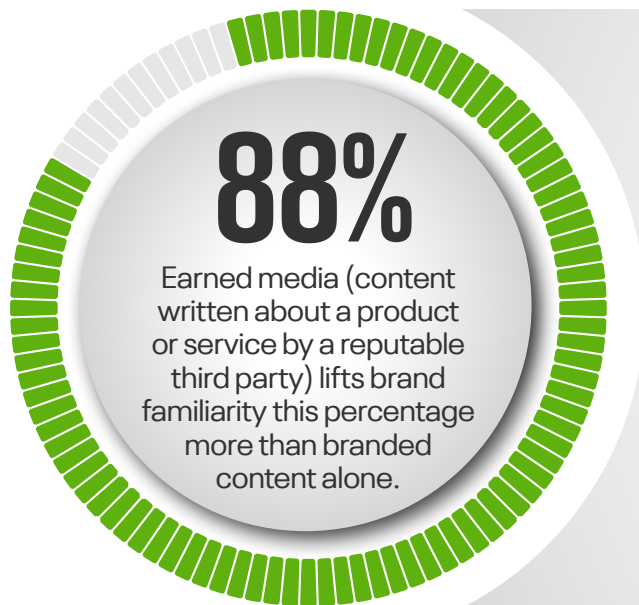


Online Publicity & Visibility

Promoting your business in today's age requires an online presence with multiple front page search listings. To build your brand, gain trust, and demonstrate your expertise, the depth of your online presence counts.

The depth of your online presence is important to people in the financial services space. Providers without a deep digital footprint can cause a host of problems – from inability of prospects and clients to connect with you, to competitors encroaching on your target group.

Third-party features that highlight your community service, experience, and thought leadership give you recognition that differentiates you from the competition.



3X

The positive credibility effect of publicity is on average about three times stronger than the information evaluation effect, supporting the overall superiority of publicity over advertising.



1st Page

Appearing on top of the organic search results improves visibility and trust, drives website traffic, and increases click-through rates and conversions.

Brand Activation

In a world where every business is competing for attention, creative engagement with your audience is important to help you stand out and differentiate your brand from the herd.

Brand activation provides prospects and clients with a unique experience across multiple touchpoints to increase brand awareness and open up additional opportunities for social sharing.

“Brand Activation forms a part of the overall brand strategy and helps the brand to connect with a consumer at a personal level, increasing brand engagement and awareness through brand experience,” according to AdScholars.



Number of Ads We See Daily:

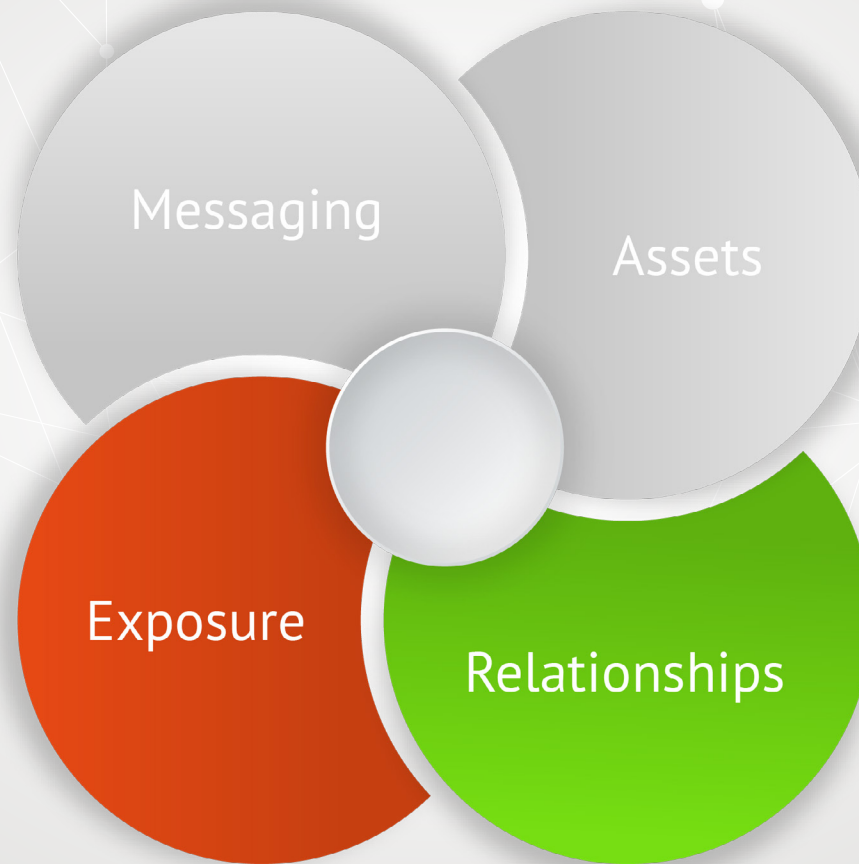
1970s:

500 to 1,600

2020s:

4,000 to 10,000

Brand Exposure & Relationships





Marketing & Advertising

Generating exposure is a cornerstone of brand-building, client acquisition, and reaching your target audience.

Brand marketing is a long-term strategy that includes one's "brand" in every aspect – essentially, it tells consumers who you are. Its goal is to strategically improve brand recognition, awareness, consideration, and value through the growth of a loyal customer base. This can be achieved through "continually and consistently communicating (a) brand's identity and values in meaningful and engaging ways."



The financial service industry invests \$160 million annually – or about 4% of their total marketing budgets – toward financial education. Consumer Financial Protection Bureau



Cause-related marketing has grown from a \$120 million industry in 1990 to \$20 billion in 2018. Large financial institutions have recognized this shift.

Communications & Client Nurturing

To maximize benefits and ensure a cohesive brand experience, it's important to integrate your social impact campaign into your prospect and client experience. This will help align the messaging with the prospect nurturing process and how you communicate with clients – helping create an authentic brand that builds trust.

Prospect Nurturing Benefits

Companies that excel at lead nurturing generate:



50%
more sales-ready leads



33%
lower cost

NFEC

Uniquely Positioned to Support Our Partners

Since 2006, the NFEC has been serving individuals and organizations who feel passionate about empowering their communities through financial education. We help financial service providers, financial educators and coaches, and content creators make a bigger difference in the lives of the people they serve.

While many in the financial education industry just ask for donations for a cause – the NFEC provides measurable value to our partners that help them meet their core business objectives. This approach has propelled us to our status as a leading financial wellness company in terms of education, materials, quality & breadth, media & online presence, and advocacy.

We have served leading personal finance influencers, top 10 universities, and several clients from the top 20 (in revenue) banking, financial service, and insurance sectors. Additionally, we have trained over 100,000 individuals through our training programs for financial educators and coaches and have more than 6,000 current clients in Certification programs.



An IACET Accredited education company that can issue CEUs



Set the standards for educators & learners that guide the financial literacy industry.



A Certified B Corporation that meets the highest standards for social impact.

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