

A photograph of a row of large, ancient trees with thick, gnarled trunks covered in green moss. The trees are set in a lush green park with a path visible in the background. The scene is peaceful and natural.

A Premium Wealth Management Brand Transformation

From Kelly Financial Group to Hammond Iles Wealth Advisors
with 98.2% client retention.

Rebranding Case Study: Marketing Director, Kelly Ashton Bradley

Building one of New England's premier boutique wealth management brands

Founded in 1984, Kelly Financial Group was challenged at translating their often abstract products and services into compelling and emotionally engaging stories. What's clear from my trending analysis is that out of the turmoil and recovery of the financial markets has come a deep desire for authenticity, trust-building, and an appetite for stories of real people doing amazing things.

As the financial industry continues to struggle with uncertainty, gaining the trust of new prospects and retaining current clients remains a significant challenge. People want to have faith in their investment firm, but they need a compelling reason to change their attitudes from that of distrust and greed reflected in popular media.

To remain credible and grow, the brand, under new ownership since 2005, needed to communicate transparency, competence, thought leadership, and a differentiated value proposition. We retained the best of the legacy brand while discarding the brand pillars that no longer resonated or reflected current reality. The brand will stay actively engaged and true to its promise to capture hearts and minds, earn trust, and command loyalty and premium.

My role as brand strategist:

- trending analysis, brand equity research
- company re-naming
- corporate identity and logo
- tagline development
- digital assets, website development & SEO
- rollout strategy and processes
- branded office environment
- marketing collateral

"Sustained growth requires essential market research, insights, analysis and thoughtful processes to expose strong market segments and build game-changing strategy."

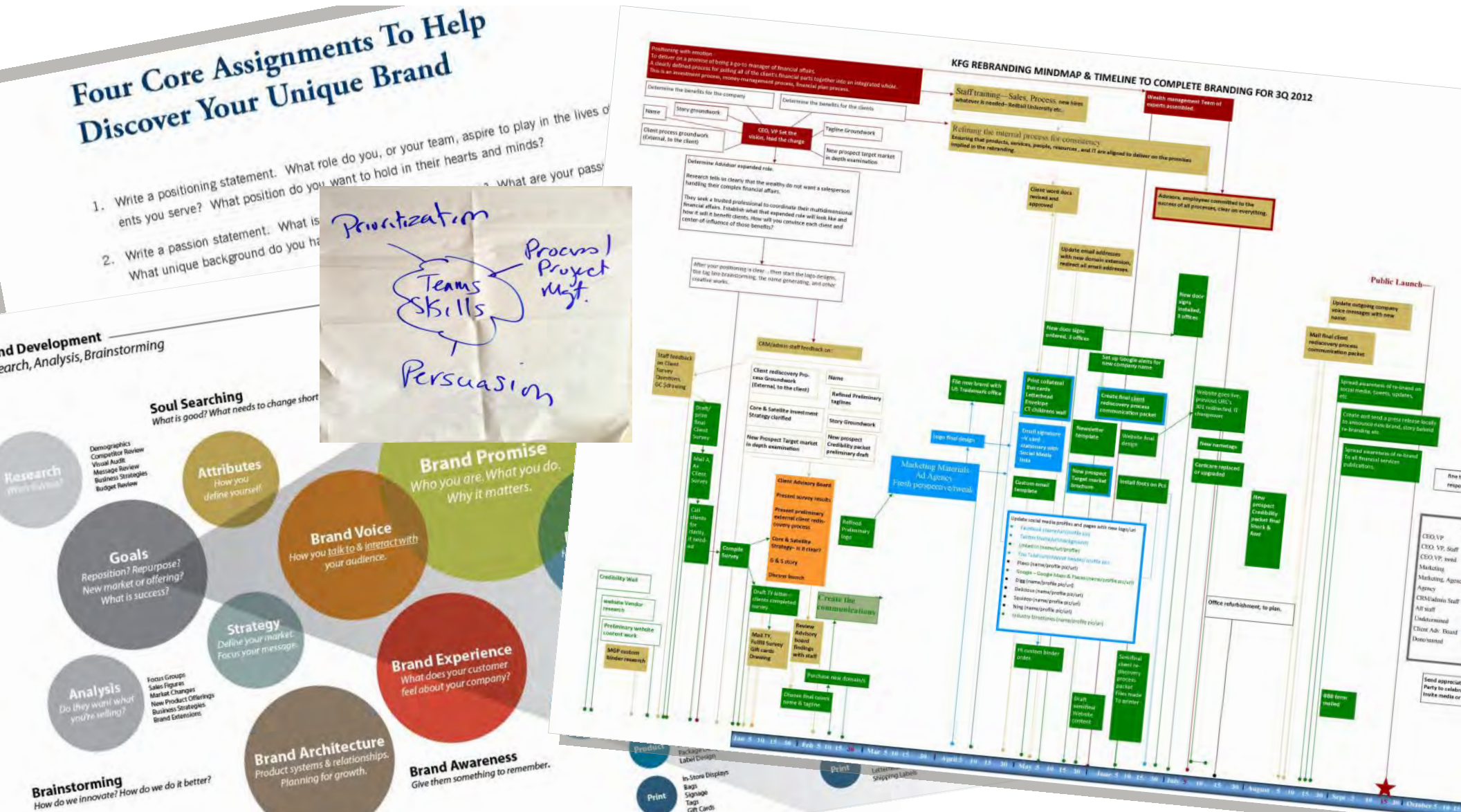
– Kelly Ashton Bradley



BRAND ARTICULATION, ASSESSMENT & TIMELINE

Uncovering the unique competitive brand position took a thoughtful discovery process and team engagement to align vision and values. Using a “strategy before creative” timeline, I conducted internal and external brand equity research consisting of current client survey, competitive analysis,

channel assessment, tagline development, and brand communications audit to spot “gaps” and identify areas for growth. Distilling the essence of the company’s unique brand differences, touch points and culture required a well-managed process.



CORPORATE IDENTITY – BEFORE

IF YOU ARE AGE 50 OR OVER, AT OR NEAR RETIREMENT AND HAVE INVESTIBLE ASSETS:

**YOU ARE INVITED TO
A COMPLIMENTARY
DINNER & SEMINAR
RSVP**



OF IT?

ing for those striving for
an independent tomorrow.

KELLY FINANCIAL GROUP
LLC
Financial Planning for Retirement

A DEPENDABLE RESOURCE
FOR YOUR FINANCIAL PLANNING NEEDS

Kelly Financial Group has been addressing the retirement and investment planning needs of active retirees since 1984. With its experienced guidance, you'll have the opportunity to plan for your vision of an independent, carefree retirement lifestyle. Give Kelly Financial Group a call

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with Kelly Financial"**

Featuring:
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KELLY FINANCIAL GROUP

WTBC NewsTalk 1080

A DEPENDABLE RESOURCE
FOR YOUR FINANCIAL PLANNING NEEDS



FOCUSED

ON YOUR FIN

CORPORATE IDENTITY – BEFORE

Prior to 2008, the firm focused on retirement planning. Clients did not always think of the company to manage assets, for advanced planning, or to plan for their legacy.

The print collateral looked typical, and did not reflect the company's vision for the future.



CORPORATE IDENTITY & NAMING

Company leaders chose between retaining, modifying, or changing the name to evolve the brand and redesign corporate identity. The original name was a vital asset and the stakes for making a change were high. Following a robust process of research to evaluate names and brand equity, the partners ultimately decided to rename the company using their own names. Because current clients felt comfortable with the partners, the result was a very smooth transition to a new, distinctive, yet familiar name with 98.2% client retention and a brand message that will carry the company forward for years to come.



A survey of clients, advisory board, and internal team revealed blues and greens, reflecting peace and harmony were preferred over other colors.

TAGLINE

A tagline can be difficult in a regulated environment because it cannot imply a promise. After many exercises, the functional tagline *planning for life & legacy* was carefully selected.

*Live for Today. Plan for Tomorrow.
Ethical investing for peace of mind.
Redefining wealth
Stability, strength, financial prosperity*

HAMMOND & ILES
Strategic Wealth and Charitable Planning



HAMMOND • ILES
Wealth Advisors

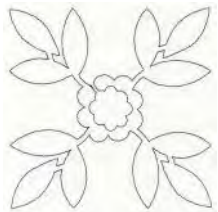


In all, over 65 designs and 48 names and variations were evaluated by the partners, client advisory board, and internal team.

CORPORATE IDENTITY

Hammond Iles Wealth Advisors needed a powerful, distinctive identity and mark to reshape their image, invigorate the brand, and position the company effectively to new markets and audiences.

Drawing inspiration from core values and differentiator, *planning for life and legacy*, the firm was attracted to a symbol reflecting growth, stability, and tradition.



INSPIRATION



HAMMOND ILES WEALTH ADVISORS

Planning for life & legacy

“The mighty oak symbolizes what we believe in and what we value—virtue, strength, longevity, resiliency, and family heritage.”



HAMMOND ILES WEALTH ADVISORS

Planning for life & legacy

Pantone Green 5743 was chosen to suggest balance, harmony and growth.

Pantone Silver Taupe 7532 reflects stability, reliability, and quiet timelessness.

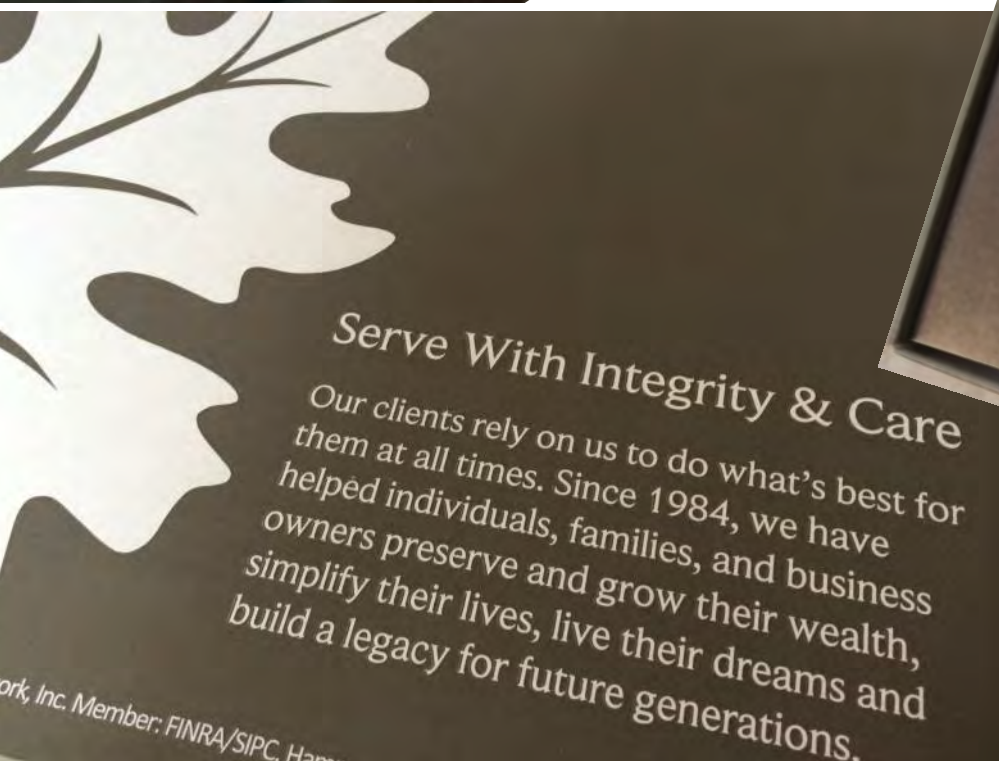
Typeface Beaufort Pro is classic, elegant, with a stately quality and high readability.

CORPORATE IDENTITY – NEW

The rebranding promised to deliver a synchronized client experience – leading the conversation, creating content that educates clients and prospects, connecting all touch points – to increase visibility, build trust, generate qualified leads, deepen relationships, and grow market share.







Prospect Package

One of the many touch points that sets the brand apart. Designed to introduce the firm and illustrate core values, unique differences, and value proposition.

WEBSITE – BEFORE

The brochure style website was through an advisor service with archiving and a back door to compliance. While the archiving service was convenient, all pages were indexed the same, the site was dated, had no analytics, focused only on retirement, and our survey revealed that few clients visited the site.



KELLY FINANCIAL GROUP
LLC
Financial Planning for Retirement

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**LIFE IS TOO SHORT...
... WHY WASTE A SECOND OF IT?**

Kelly Financial Group LLC – retirement planning for those striving for an independent tomorrow.

About your RMD

FA
FINANCIAL ADVISOR
RIA
SURVEY & RANKING
2012



July 2012
The Kelly Financial Group team has once again, been recognized in the FA Magazine 2012 Independent Top RIA Survey, ranking number 463. This accomplishment signifies company growth and is a great accomplishment!

OUR MISSION

We assist our clients in the pursuit of their financial goals and life visions by providing knowledge, guidance and innovative solutions with integrity and care. In partnership with our clients, we strive to make a positive difference in our communities."

Reach Your Goals With A Lifestyle Plan

Workshops & Events

Our Radio Show

Roth IRA Conversion

Economic Updates

True Wealth Blueprinting

Book Greg or Scott for an Event

Client "Lifestyle Plan"

BBB
Rating: A+
Click for Review

Securities offered through Securities Service Network, Inc, A registered broker/dealer. Member **FINRA & SIPC**.

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Other times are available by appointment.



KELLY FINANCIAL GROUP
LLC
Financial Planning for Retirement

PLAN FOR THE RETIREMENT YOU DESERVE

About Us

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Research



Many people retire anxiously, uncertain whether they'll have enough to live on or the ability to maintain their lifestyle. You do not need to be one of them. Greg and Scott make every effort to assist you in finding the confidence to plan for a tomorrow without money worries.

KFG complete financial services include...

- Retirement and estate planning
- Investment planning
- Tax reduction planning
- Risk management
- Life insurance
- Long-term care solutions
- Charitable planned giving
- True Wealth Consulting & Blueprinting

ONE STEP AT A TIME

We work diligently to help clients plan and live the life they have always imagined, and create a clear and compelling vision for their future. With a low-key approach that instills confidence and trust we give you room to breathe and make decisions at your own pace. Helping you achieve your goals is every bit as important as providing the financial tools and concepts that can assist you along the way.


July 2012
The Kelly Financial Group team has once again, been recognized in the FA Magazine 2012 Independent Top RIA Survey, ranking number 463. This accomplishment signifies company growth and is a great accomplishment!

"Before we even consider recommending a course of action, we have several meetings with our clients to listen and learn about what is important to them."

As an independent firm, Kelly Financial Group doesn't sell proprietary products for an insurance company or financial institution. We have the freedom to search the marketplace and recommend select products and services based solely on your best interests.

Life is too precious to worry about money matters. A retirement plan without passion and commitment is hard work and sacrifice and easily derailed. Greg Hammond, Scott Iles and associates bring experience and total commitment to help you plan for a meaningful tomorrow – so you may have the freedom and confidence to live life to the fullest.

We look forward to hearing from you!

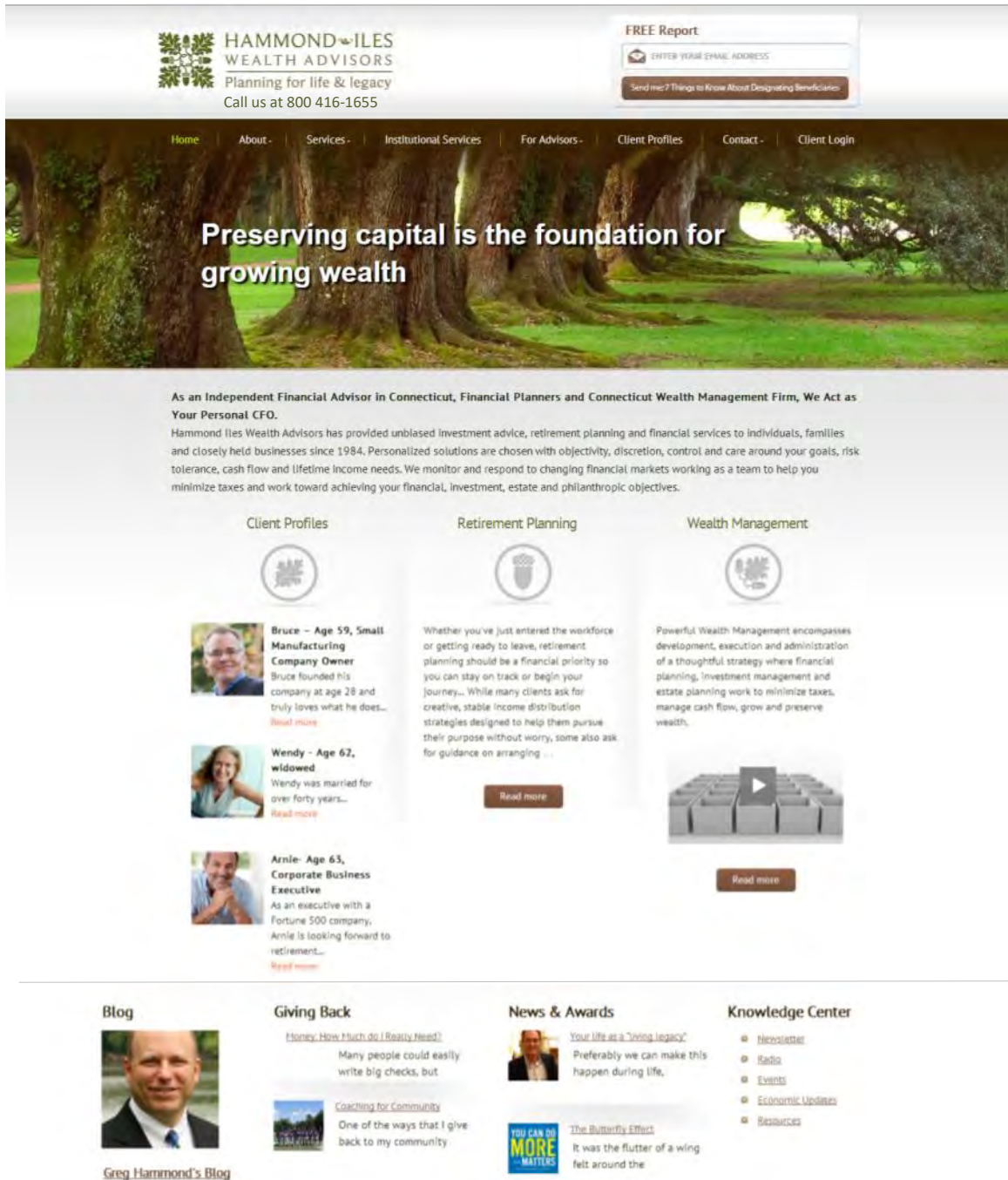


"Before we even consider recommending a course of action, we have several meetings with our clients to listen and learn about what is important to them."



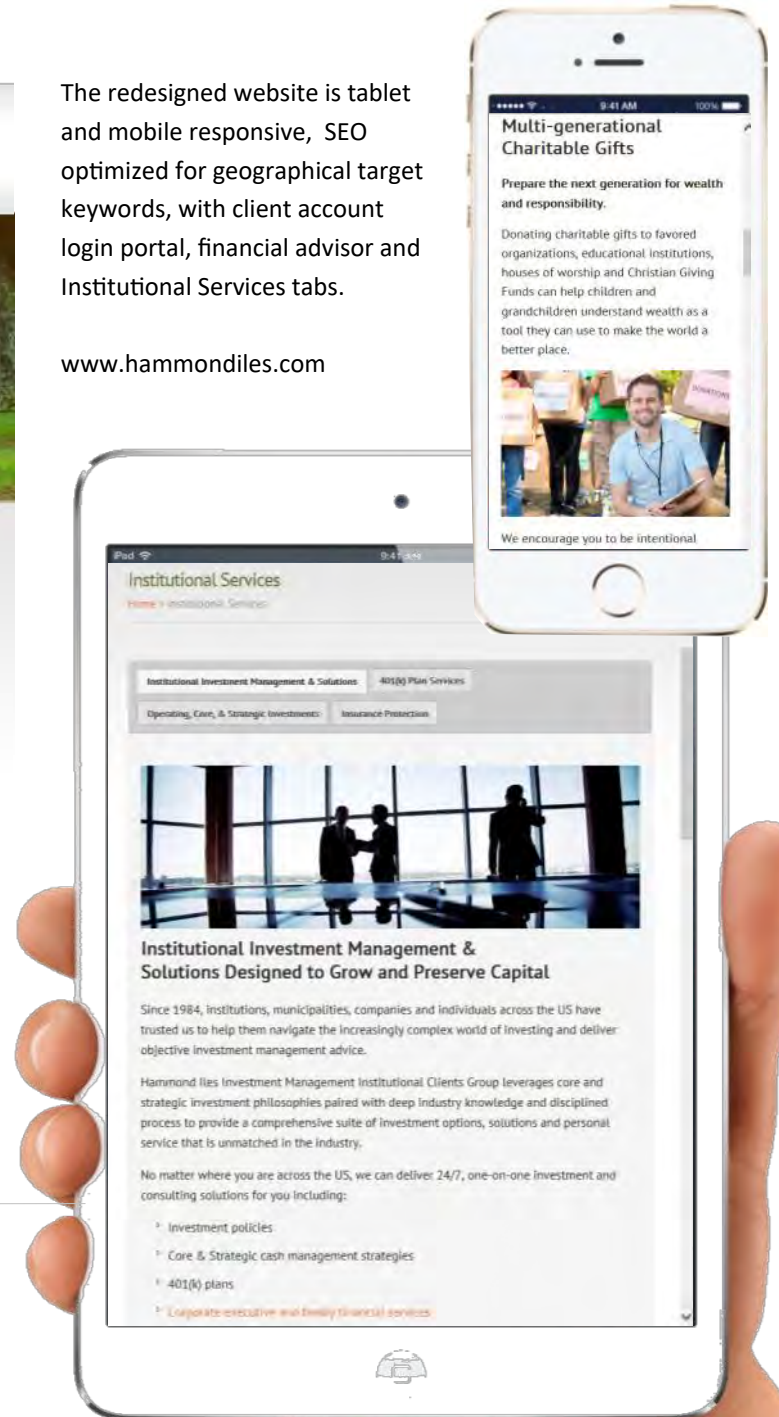
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The redesigned website is tablet and mobile responsive, SEO optimized for geographical target keywords, with client account login portal, financial advisor and Institutional Services tabs.

www.hammondiles.com

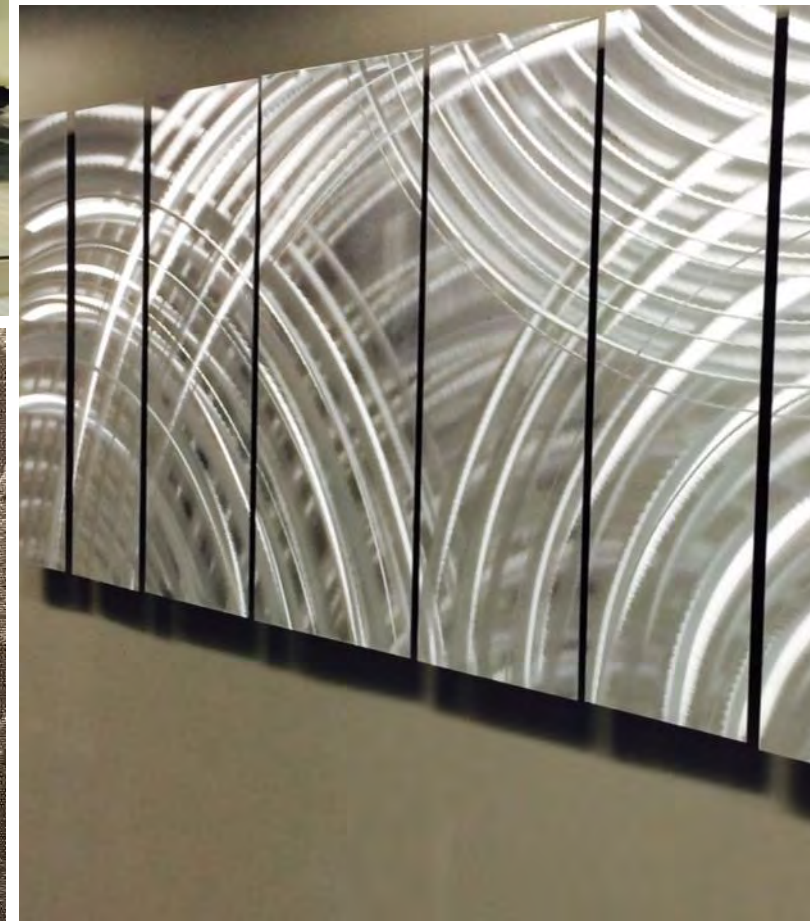




Phase 4

BRANDED ENVIRONMENT

A branded office space turns the company's story into three dimensions engaging the senses, creating the mood, ambience, and feelings that people associate with the brand as a whole. While each office displays regional differences, the environment reflects the culture of the organization — and translates that culture into an experience that drives loyalty.





Phase 5 BRAND LAUNCH

A sensational, yet cost-effective launch party officially introduced the new brand to over 320 clients and prospects while building client relationships and increasing team engagement.

The partners honored the founder and team members who diligently worked to bring the new brand to fruition. Clients and prospects were introduced to the new services, got to know the team better, enjoyed dinner, dancing, prizes, music, and photo booth fun.





Phase 6

ONGOING BRAND EVOLUTION

Once a brand is established, ongoing evolution and digital transformation is essential when the company aspires to do something HUGE. At Hammond Iles, the mission isn't only about investing. It's about changing with the times and empowering people to achieve their dreams.

As the world becomes ever more inter-connected, unifying physical, digital, and social experiences will create significant value for Hammond Iles, their clients, and the organizations and communities they support.

Consistently exceeding peoples' expectations requires more than a language that's shared company-wide on how the brand looks, feels, and behaves. It requires adopting digital tools, methods, technology and products that place clients needs and security at the center while contributing to the firms' efficiency and wellbeing as the company scales.

SOCIAL EXPERIENCES

Launching a series of investor education classes and wealth mastery events empowered investors to make smarter financial decisions. More than 1000 individuals, families and business owners attended the first year creating a community of like-minded investors all working toward one goal: financial freedom so they can live life on their own terms.



A DIGITAL GROWTH ENGINE

To ensure an ever-more-meaningful brand experience, marketing automation, a revised website, and a robust content marketing strategy were deployed to help people easily explore solutions to their needs. In turn, this automated prospecting system funnels into powerful live events, webinars, and livestreams for a personal touch and customized advice that only an integrated experience can deliver.



SUMMARY

“The past few years have been about transition. Ongoing issues in the financial industry continue. However, times of great change and challenge are also times of unlimited opportunity.

A powerful brand is a living business asset – the central organizing principle for a company – establishing clear values and principles which guide future strategies and over time, influence external perceptions. It’s a differentiating promise that grows, and evolves – *and people are at the center of it all.*

Today’s informed and discerning clients demand a high degree of engagement and consistency. Increasingly, a brand’s capacity to deepen existing relationships and develop new ones relies on their ability to leverage new technology.

Realizing that every market is different, every interaction counts, and every individual matters will continue to contribute to the Hammond Iles brand power and prosperity.” – Kelly Ashton Bradley

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