A Premium Wealth Management Brand Transformation

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

Rebranding Case Study

Kelly Ashton Bradley
Marketing Director

Life is beautiful. *Cherish your relationships. Wisely set your financial resources. Appreciate the majesty of the world that surrounds us. A loving home is the foundation for your life. Hug a friend.*

Share your dreams. *Learn something new each day. Make peace with your past. Value your health. Take time to sit quietly for a few minutes each day and reflect upon your thoughts. Be driven by your purpose.* Build a legacy.

Building a Premier East Coast Boutique Wealth Management Brand

Founded in 1984, Kelly Financial Group was challenged at translating their often abstract products and services into compelling and emotionally engaging stories.

What is 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 creating impact.

As the financial industry continues to address profound change, gaining the trust of new prospective clients and retaining current clients remains a significant challenge.

People want to have faith in their wealth and investment management firm, but they need a compelling reason to see beyond the attitudes of distrust and greed reflected in popular media.

To remain credible and grow, the brand, under new ownership since 2005, needed to evolve; communicating 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 peoples' hearts and minds, earn trust, and command loyalty and premium.

My role as brand strategist:

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

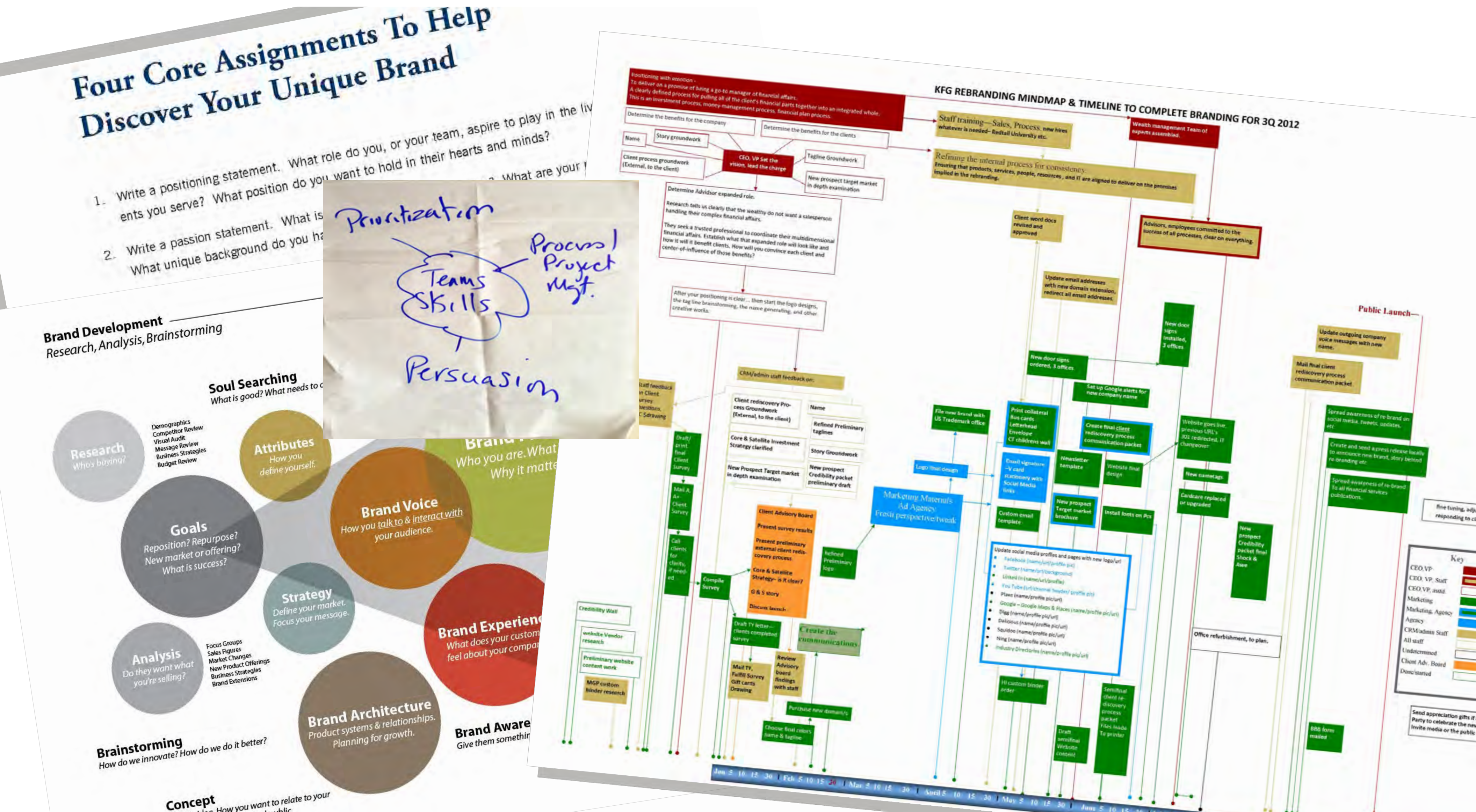
"Sustained growth requires essential market research, insights, analysis, and thoughtful processes to expose opportunities and build game-changing strategy."

– Kelly Ashton Bradley

Phase 1 Planning

BRAND ARTICULATION, ASSESSMENT & TIMELINE

Uncovering unique competitive brand positioning 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

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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.

Phase 2

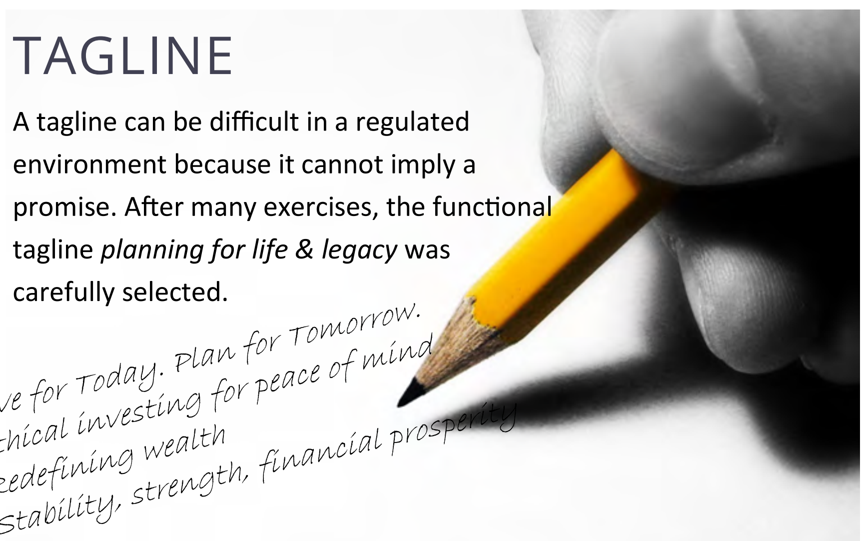
CORPORATE IDENTITY & NAMING

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.



HAMMOND & ILES
Strategic Wealth and Charitable Planning

HAMMOND • ILES
FINANCIAL GROUP

HAMMOND • ILES
Wealth Advisors

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 more effectively to the high net worth market.

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

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."

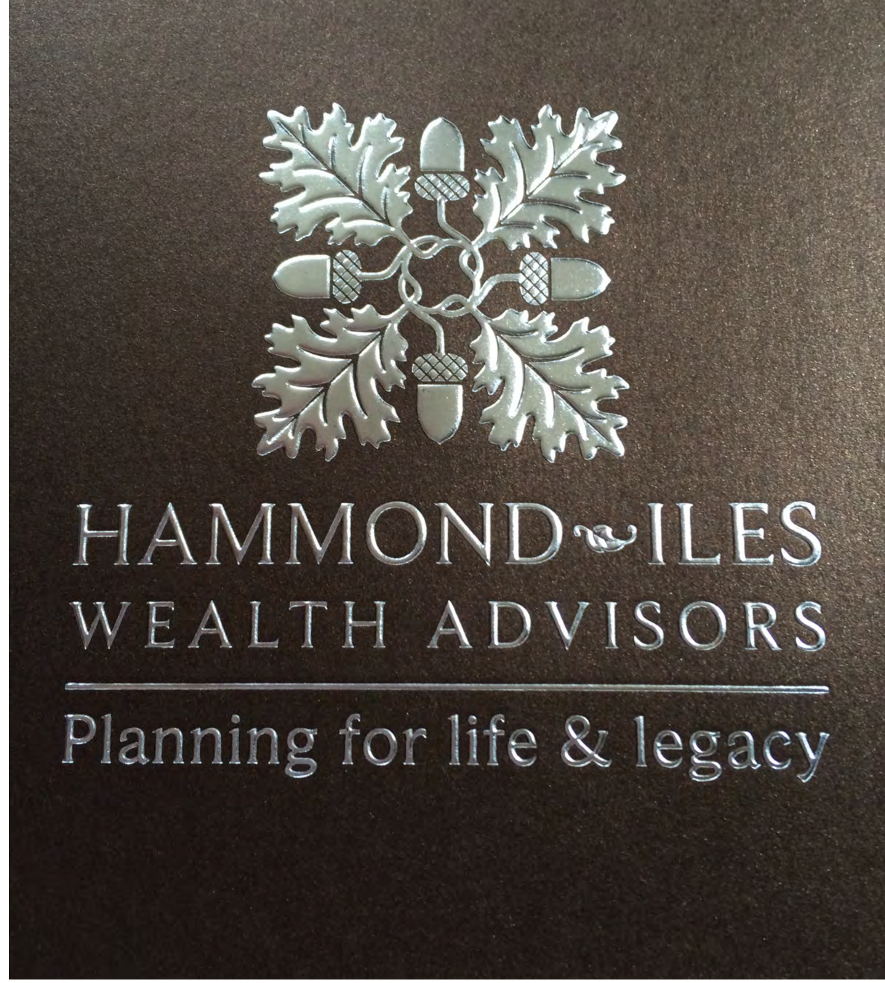
HAMMOND ILES
WEALTH ADVISORS
Planning for life & legacy

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.

NEW CORPORATE IDENTITY

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 referrals, deepen relationships, and grow market share.


HAMMOND ILES
WEALTH ADVISORS
Planning for life & legacy
Let's Talk
What to discuss today
for a happier retirement
Learn how you can benefit from:
Analyze • Plan
Financial
Planning for life & legacy


HAMMOND ILES
WEALTH ADVISORS
Planning for life & legacy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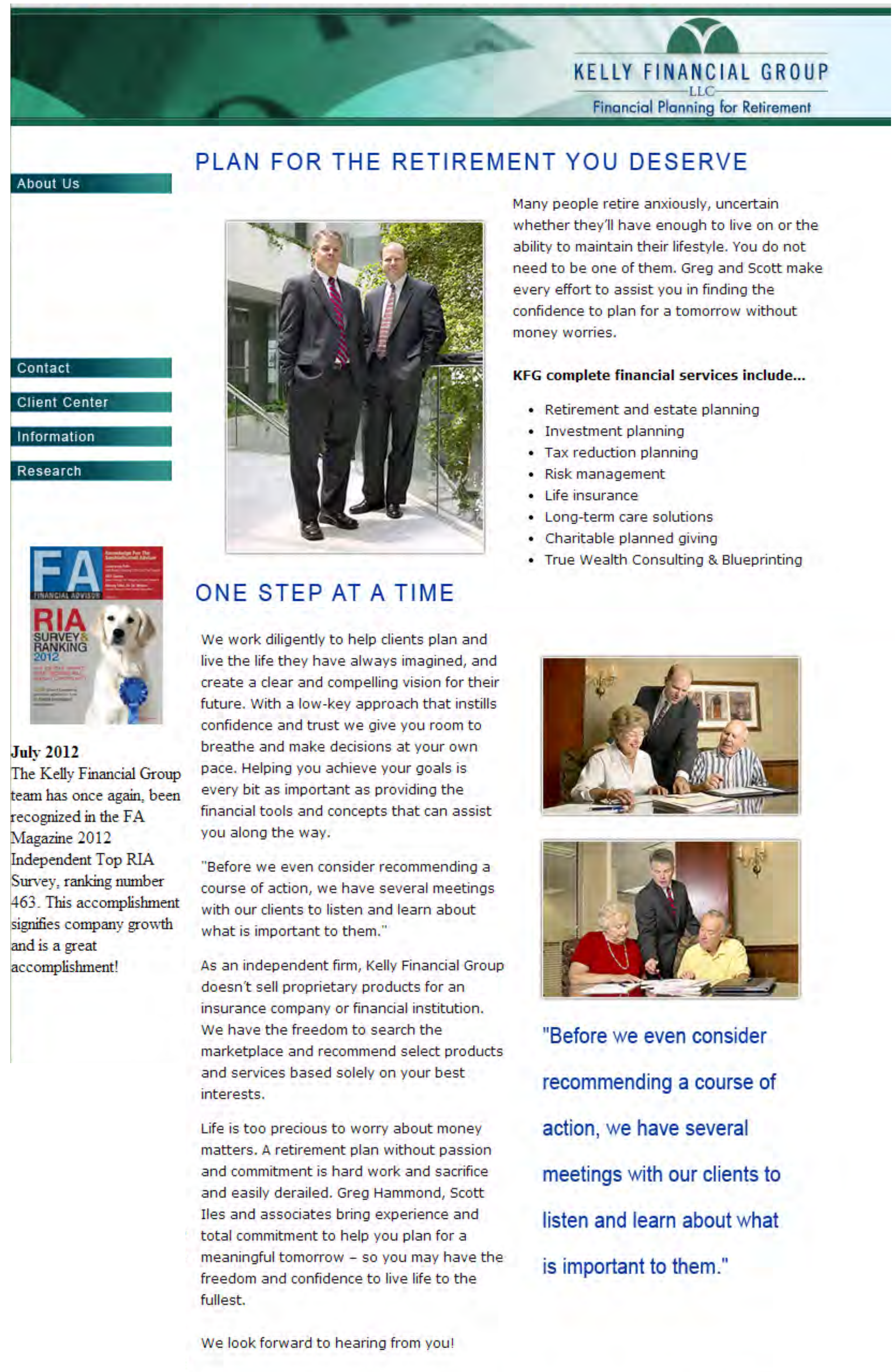
HAMMOND ILES
WEALTH ADVISORS

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.

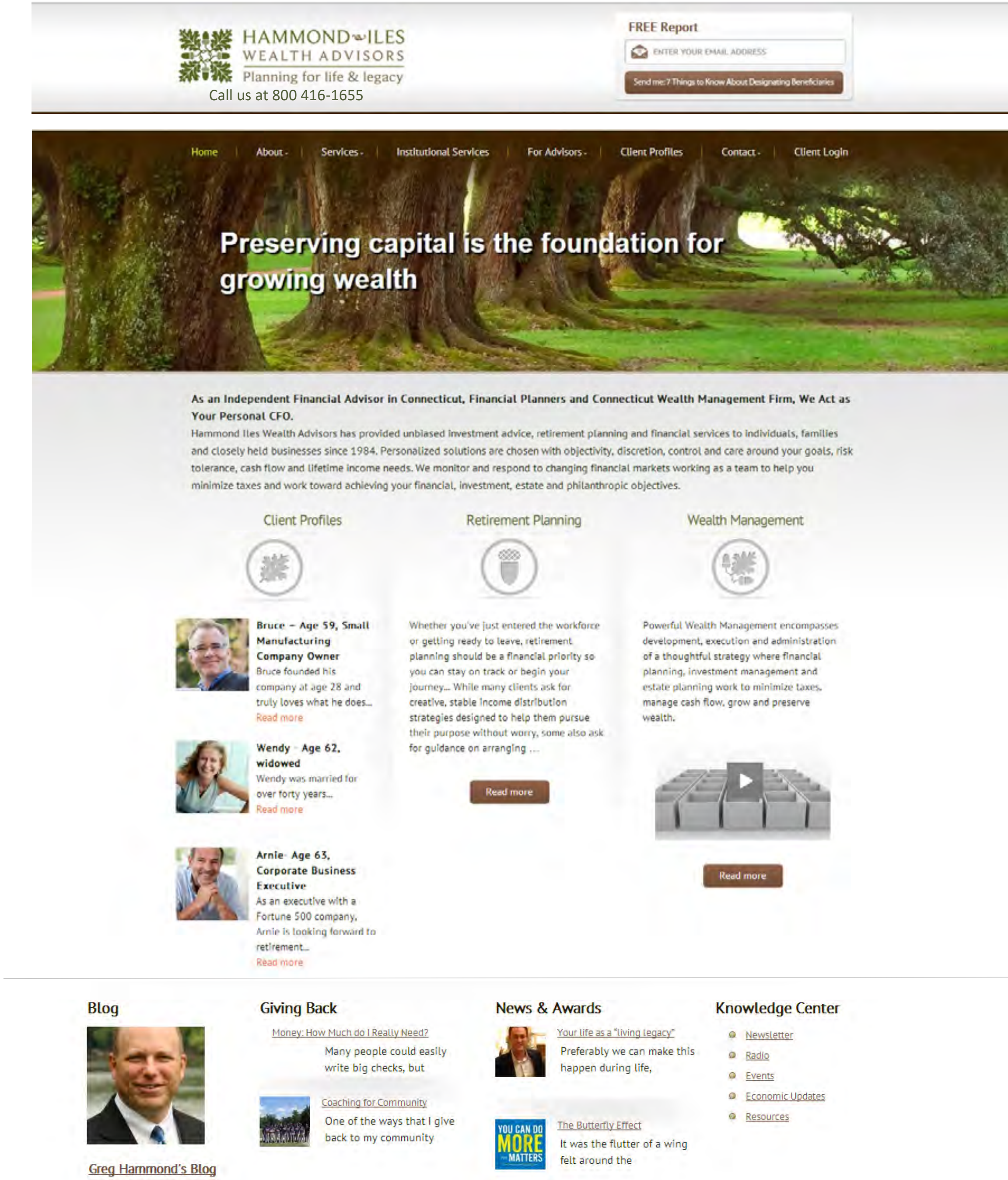
WEBSITE – BEFORE

The brochure style website misrepresented the firm's capabilities. It was through an advisor service with compliance archiving that, while convenient, had little SEO value. All pages were indexed the same, the site was dated, had no analytics, focused only on retirement, and a survey revealed that few clients visited the site.



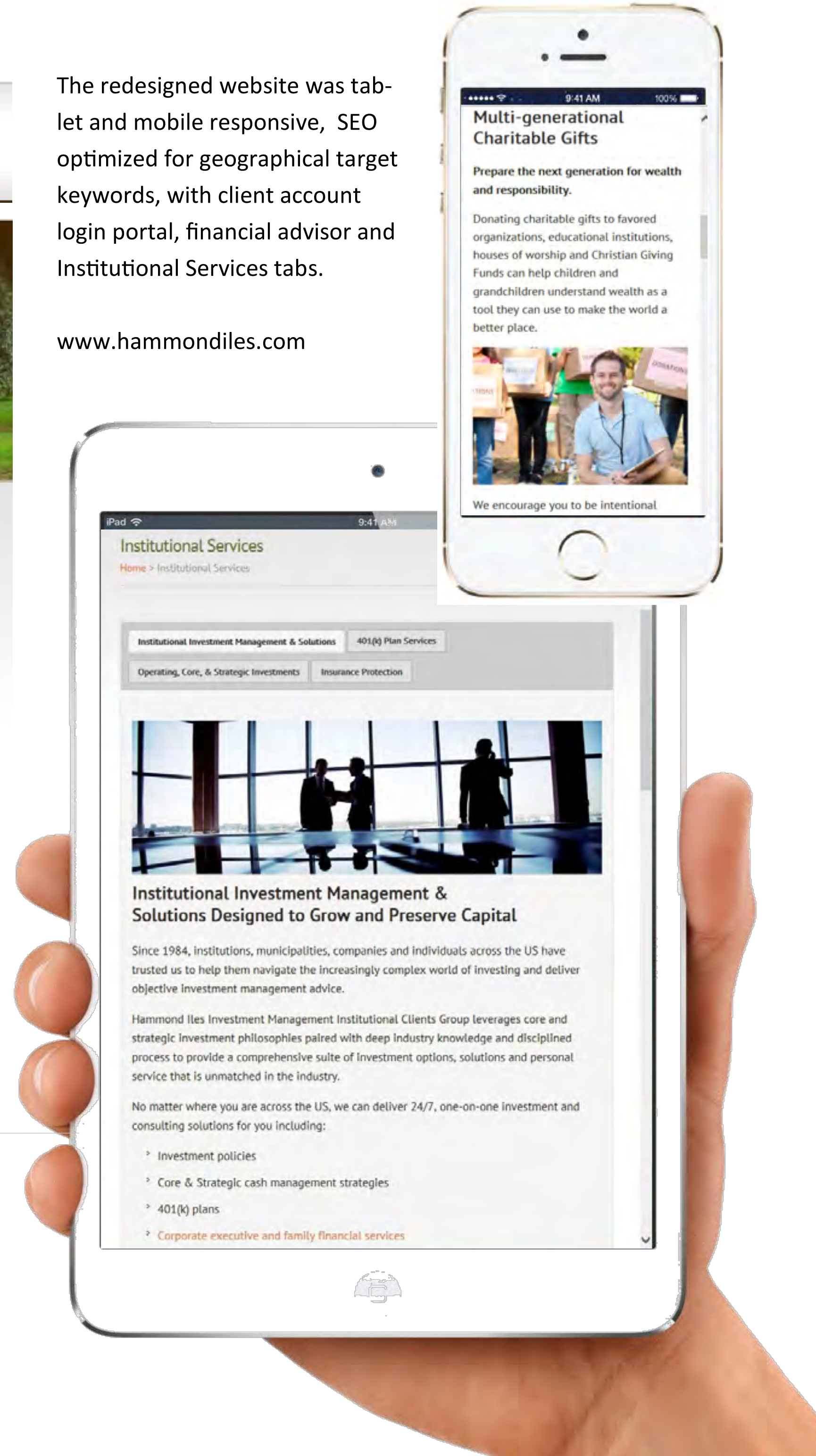
Phase 3 Digital Assets

INITIAL WEBSITE REDESIGN



The redesigned website was 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 engagement.


Phase 5


A sensational, yet comfortable launch party officially introduced the new brand to over 320 clients and influencers while building 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.



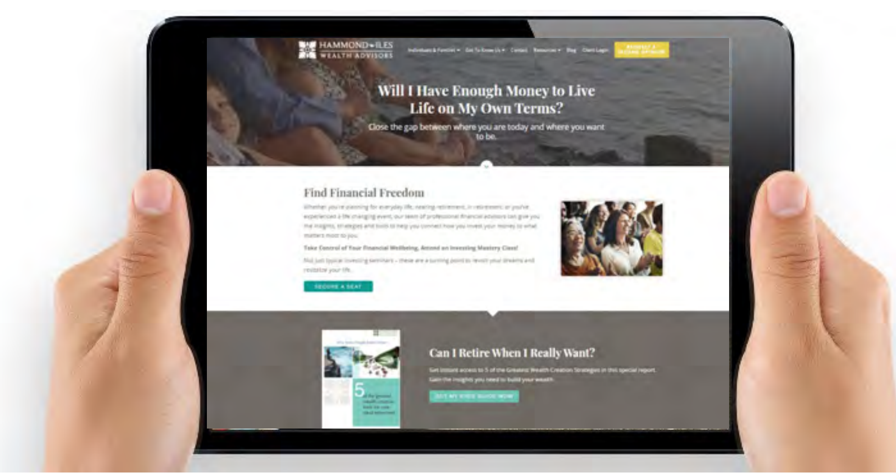






COMMUNITY

Launching a series of investor education wealth mastery events empowered people and created a community of like-minded investors all working toward one goal: peace of mind, abundance and impact.



Phase 6

ONGOING BRAND EVOLUTION

Once a brand is established, ongoing evolution and digital transformation is essential when the company aspires to create significant IMPACT. As Hammond Iles evolves into a wealth management and life coaching firm, the mission isn't only about the financial dimensions of wealth. It is about changing with the times and empowering upcoming generations to achieve their dreams.

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

Consistently exceeding expectations requires a shared company-wide focus on how the brand looks, feels, and behaves. It means placing client needs and security at the center while contributing to the firms' efficiency and wellbeing as the company scales.

DIGITAL GROWTH ENGINE

To ensure an ever-more-relevant brand experience, marketing automation, a revised website, and an initiative-based content marketing strategy were deployed to help people explore solutions to their needs. Designed to implement in stages and support a robust PR and business development strategy it will paint a digital picture of the brand and funnel new audiences into powerful live and online events for a personal touch and customized advice that only an integrated experience can deliver.

SUMMARY

“The past decade has been about evolution in the financial industry. 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 develop and deepen relationships relies on its ability to leverage personal interactions with new technology. Realizing that every market is different, every touchpoint counts, and every individual matters will continue to contribute to the Hammond Iles brand power and prosperity.”

– Kelly Ashton Bradley

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