

A row of large, moss-covered trees in a park setting. The trees are thick and gnarled, with their roots exposed and covered in green moss. The background shows a green lawn and a path leading into the distance.

# 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

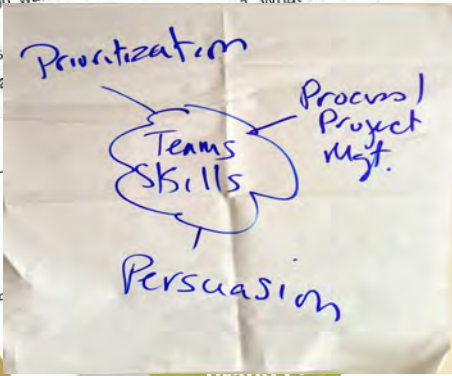
# BRAND ARTICULATION, ASSESSMENT & TIMELINE

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.

## Four Core Assignments To Help Discover Your Unique Brand

1. Write a positioning statement. What role do you, or your team, aspire to play in the lives you serve? What position do you want to hold in their hearts and minds?
2. Write a passion statement. What is your passion? What unique background do you have? What are your values?



### Brand Development Research, Analysis, Brainstorming

### Soul Searching What is good? What needs to change?

**Research**  
Who's buying?  
Demographics  
Competitor Review  
Visual Audit  
Message Review  
Business Strategies  
Budget Review

**Attributes**  
How you define yourself.

**Goals**  
Reposition? Repurpose?  
New market or offering?  
What is success?

**Strategy**  
Define your market.  
Focus your message.

**Analysis**  
Do they want what you're selling?  
Focus Groups  
Sales Figures  
Market Changes  
New Product Offerings  
Business Strategies  
Brand Extensions

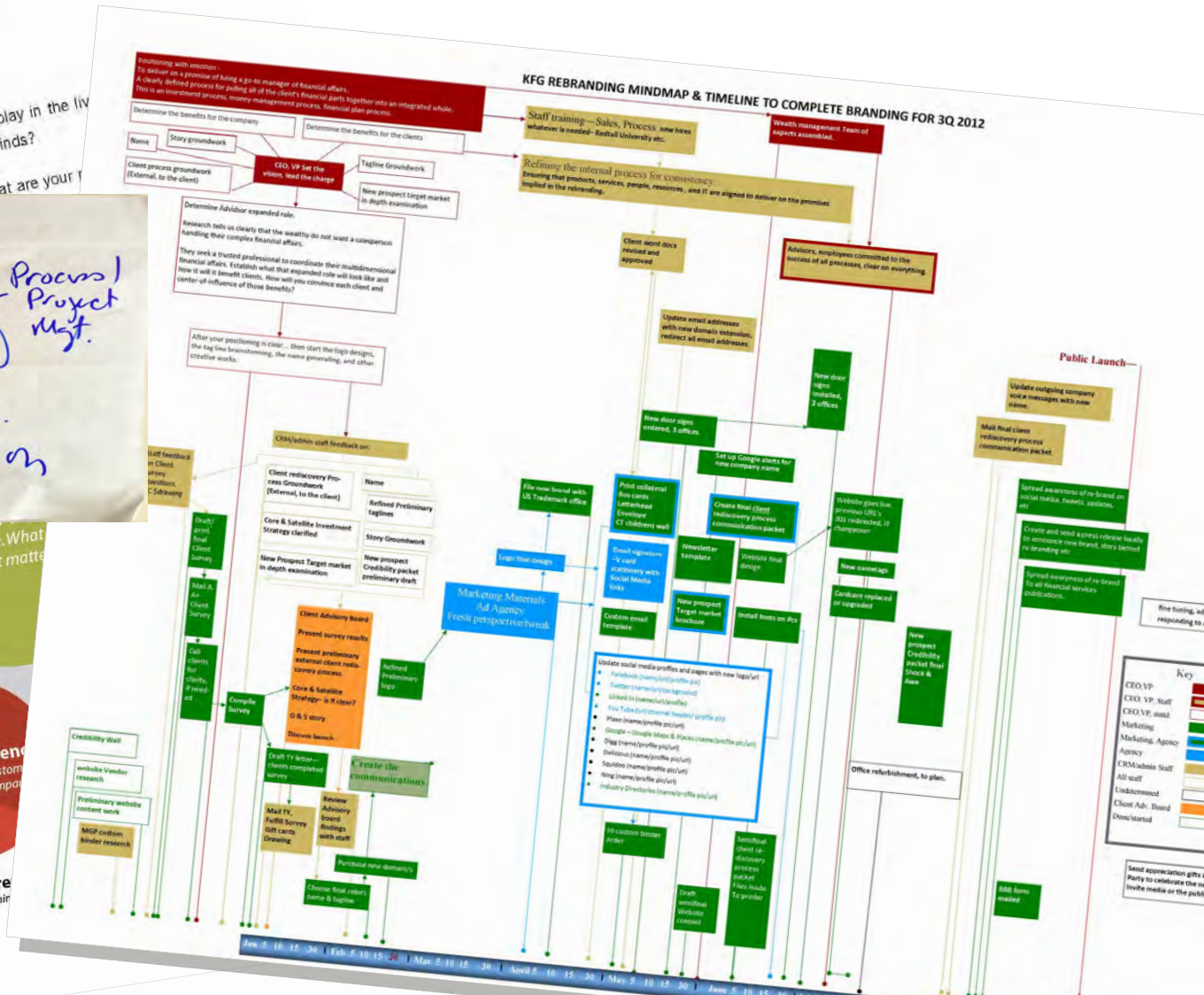
**Brand Architecture**  
Product systems & relationships.  
Planning for growth.

**Brand Experience**  
What does your customer feel about your company?  
Feedback  
Surveys  
Focus Groups

**Brand Aware**  
Give them something to remember.

### Brainstorming How do we innovate? How do we do it better?

### Concept How do you want to relate to your market?





# 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

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 and carefree retirement lifestyle. Give Kelly Financial Group a call



On Air  
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**A DEPENDABLE RESOURCE  
FOR YOUR FINANCIAL PLANNING NEEDS**

Fall 2008

**"Planning for Tomorrow  
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Greg Hammond, CFP® CPA and Scott Iles

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**FOCUSED  
ON YOUR FINANCIAL**



## 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.

  
**KELLY FINANCIAL GROUP**  
 LLC  
 Financial Planning for Retirement  
 100 Great Meadow Road, Suite 103  
 Wethersfield, CT 06109

  
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 LLC  
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**Senior Market Advisor**

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 www.SeniorMarketAdvisor.com

  
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 Financial Planning for Retirement





  
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**KELLY FINANCIAL GROUP**  
 LLC  
 Financial Planning for Retirement

**A DEPENDABLE RESOURCE FOR YOUR FINANCIAL PLANNING NEEDS**

Fall 2008

**Financial Focus**



**The 2008 Kelly Financial Group Summer Celebration was a Hit!**

On August 20, 2008, the staff of Kelly Financial Group celebrated with their friends and family members a beautiful evening with a delicious meal, live music, and a fun game. We hope that everyone who attended appreciated your business and the strong, viable and leading edge services we work toward our goal of retirement (CCMC).

Congratulations to Bob and Sarah for their largest contribution to CCMC's summer celebration.

We will be posting pictures from the celebration on [www.kellyfg.com](http://www.kellyfg.com).

**Market Update and Outlook**

As the summer of 2008 ended, August the volume on the New York Stock Exchange was unfortunately did stick around, it was unfortunate when the Dow Jones Industrial Average...

**planning with**

**Sunday**

**or listen!**

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 Woodbridge, CT 06525



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.

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



HAMMOND • ILES  
FINANCIAL GROUP



HAMMOND • ILES  
Wealth Advisors



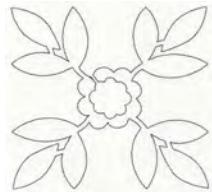
HAMMOND • ILES  
Wealth Advisors

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.

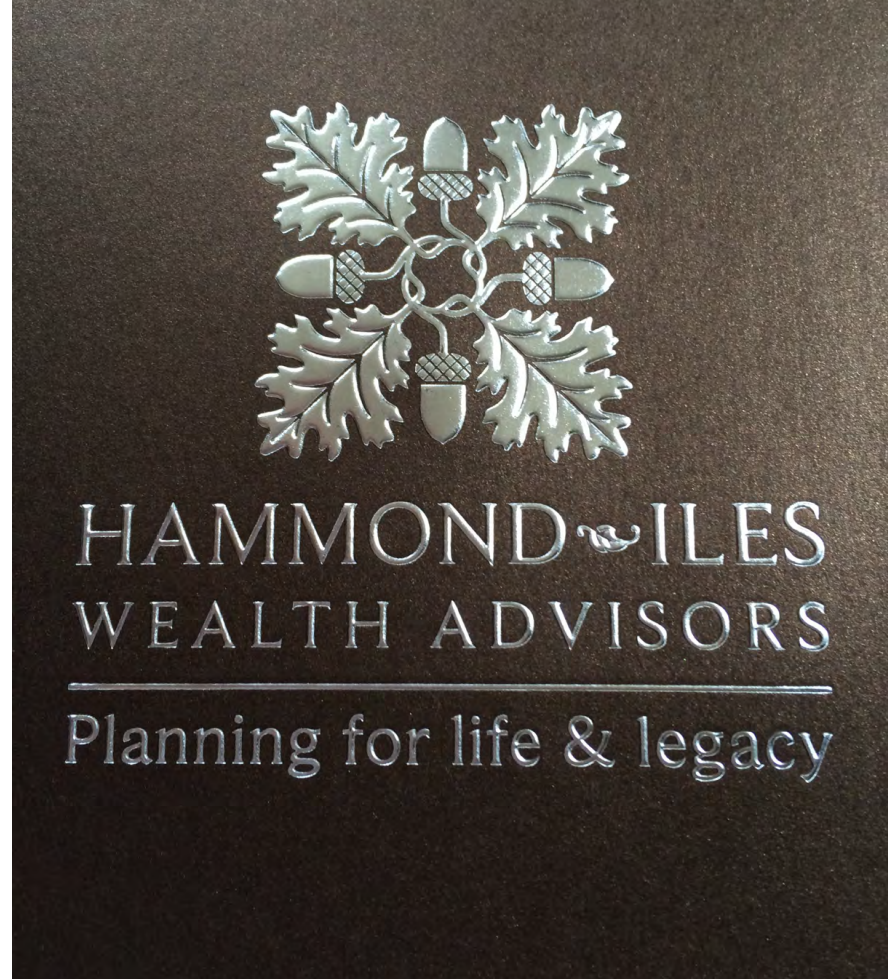
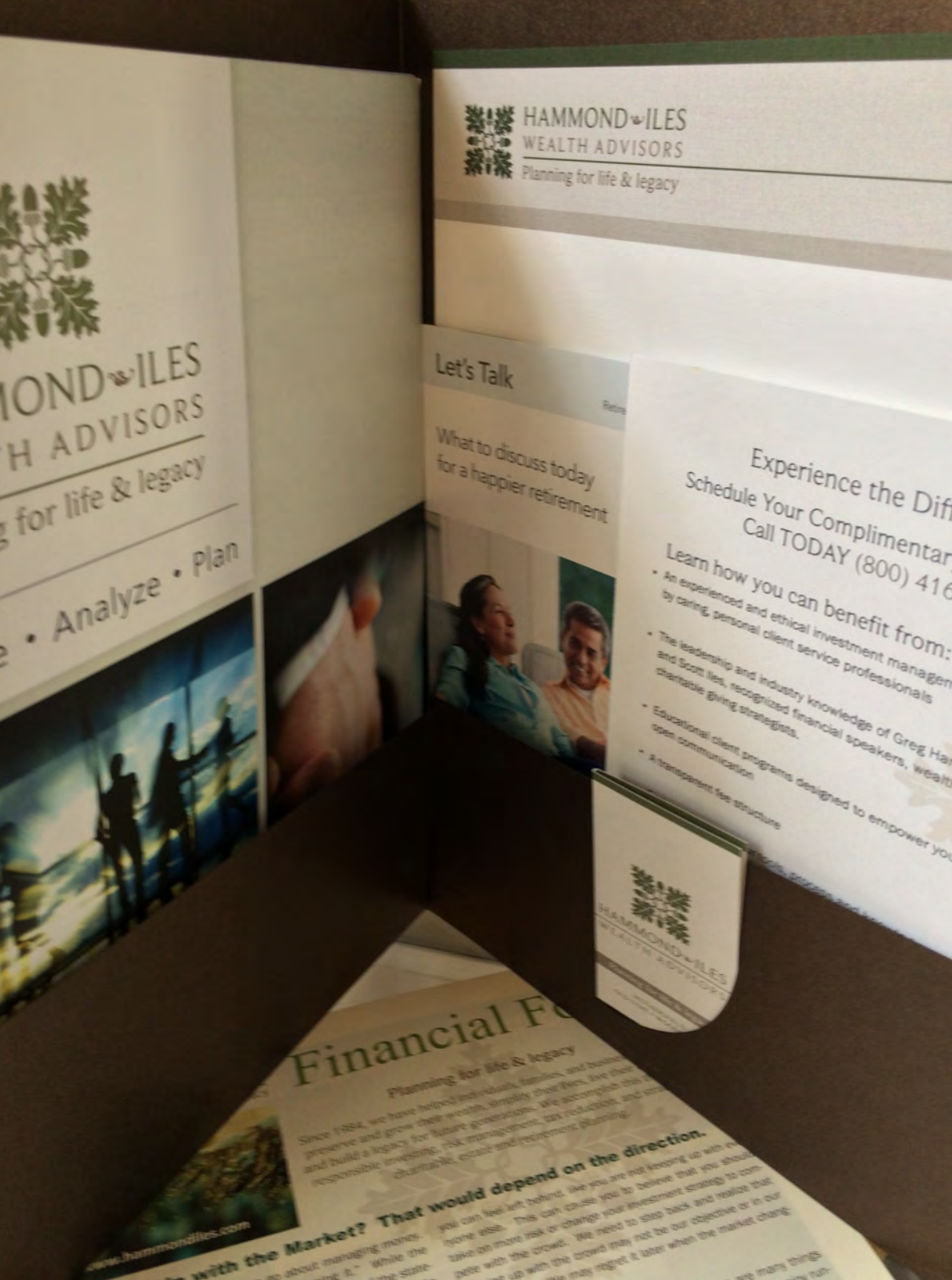


# NEW CORPORATE IDENTITY

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.











**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.

**KELLY FINANCIAL GROUP**  
LLC  
Financial Planning for Retirement

About Us  
Contact  
Client Center  
Information  
Research

**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!

**FA Magazine Top RIA Ranking 2012**

**BBB**  
Rating: A+  
Click for Review

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

100 Great Meadow Road, Suite 103, Wethersfield, CT 06109  
**Phone:** 860.258.2600 **Toll Free:** 800.416.1655  
**Fax:** 860.258.2607 **Email:** [info@kellyfa.com](mailto:info@kellyfa.com)  
Office hours:  
Monday-Thursday 9-5 Friday 8-4.  
Other times are available by appointment.

**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"**

**KELLY FINANCIAL GROUP**  
LLC  
Financial Planning for Retirement

About Us  
Contact  
Client Center  
Information  
Research

**PLAN FOR THE RETIREMENT YOU DESERVE**

**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.

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FINANCIAL ADVISOR  
**RIA**  
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**Client "Lifestyle Plan"**

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

"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."

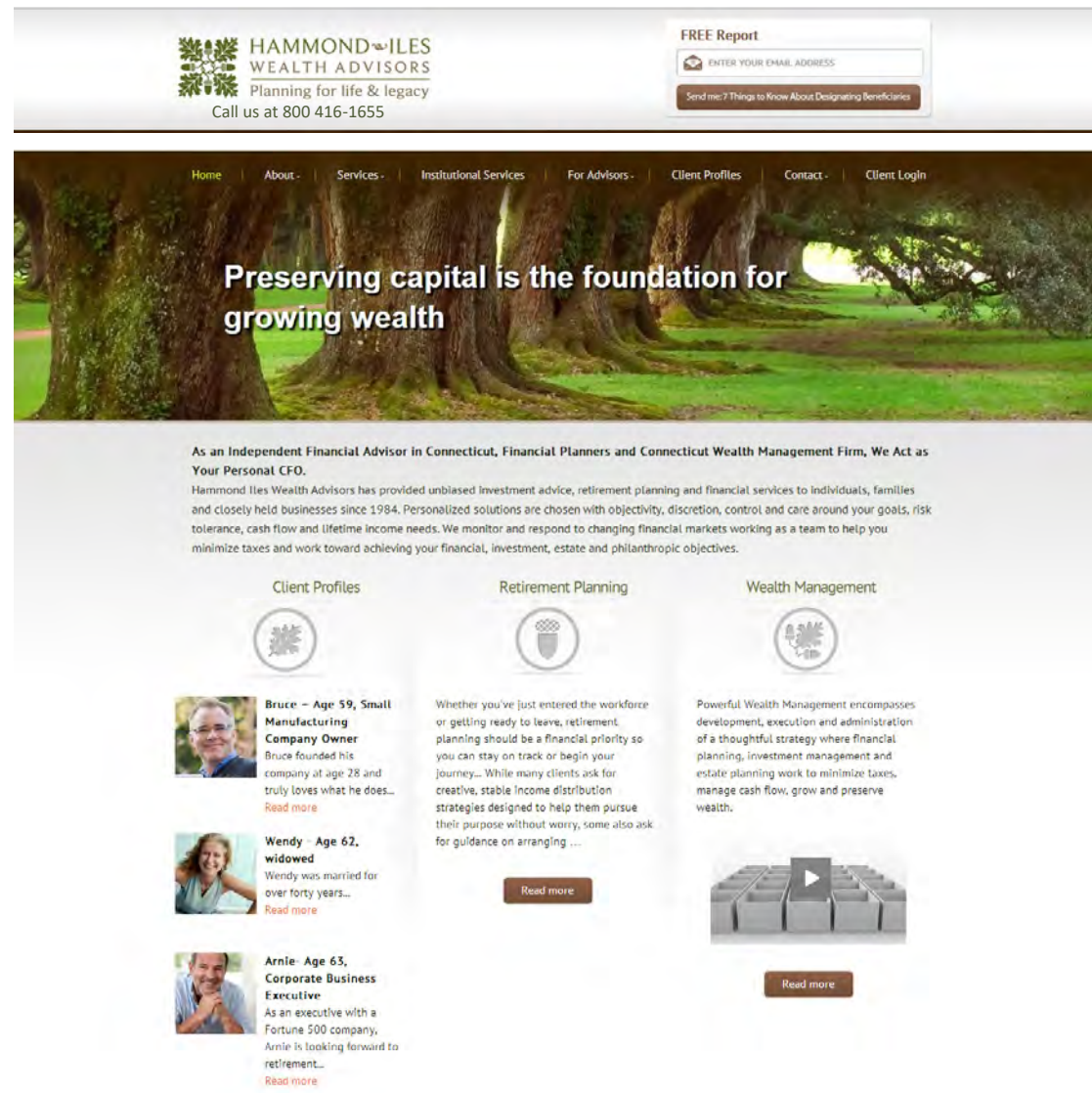
As an independent firm, Kelly Financial Group doesn't sell proprietary products for an insurance company or financial institution. We have the freedom to search the marketplace and recommend select products and services based solely on your best interests.

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!

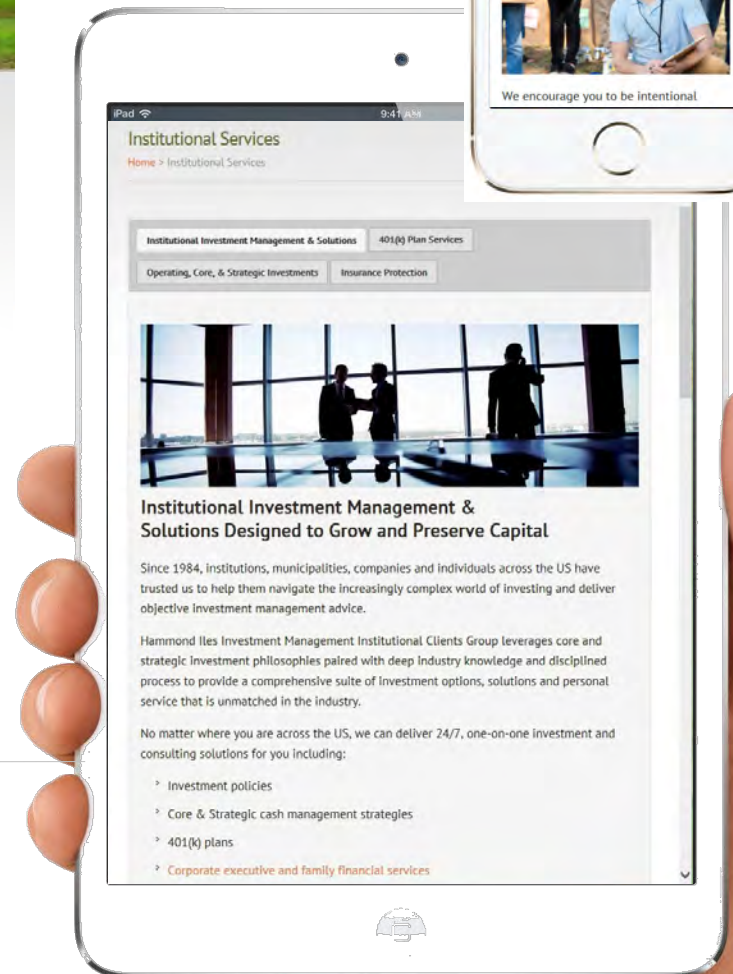
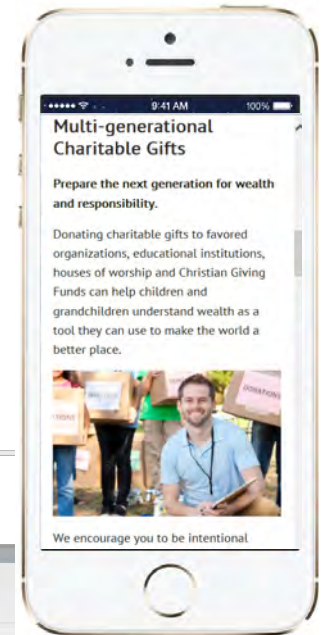


# Phase 3 Digital Assets INITIAL WEBSITE REDESIGN



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



## Blog



Greg Hammond's Blog

## Giving Back

### Money: How Much do I Really Need?

Many people could easily write big checks, but



### Coaching for Community

One of the ways that I give back to my community

## News & Awards



### Your life as a "living legacy"

Preferably we can make this happen during life,



### The Butterfly Effect

It was the flutter of a wing felt around the

## Knowledge Center

- [Newsletter](#)
- [Radio](#)
- [Events](#)
- [Economic Updates](#)
- [Resources](#)





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.







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.

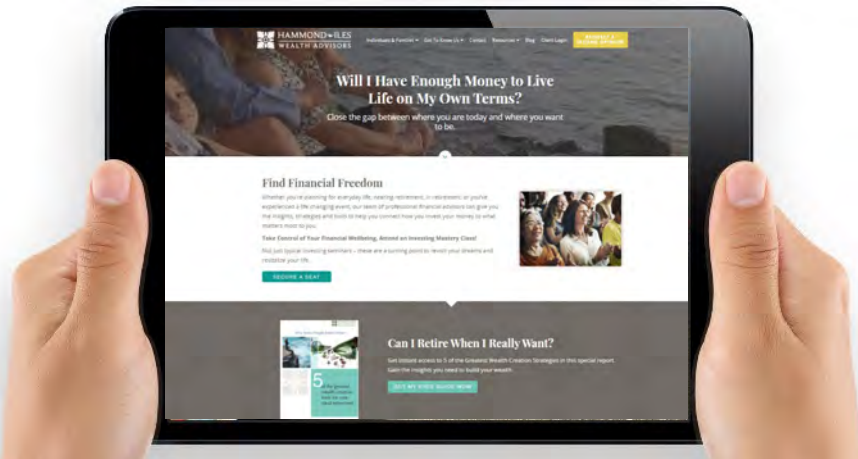
## COMMUNITY

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.



## 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 touch-point counts, and every individual matters will continue to contribute to the Hammond Iles brand power and prosperity.”

– Kelly Ashton Bradley

<https://www.linkedin.com/in/kellyashtonbradley>

