Core Brand Questions

*Use the following worksheet to help outline information about your firm brand. We have provided some examples to help guide your answers, but the more detail you can provide the easier it will be for you to define your consistent brand.*

**Our Personal Why: Why We Do What We Do**

These are your personal motivators, strengths and differentiators that inspire your passion for the business.

**Target Client Description**

This is a description of your target clients. Descriptions can be both qualitative and quantitative. Include your AUM minimum. If you do not have a defined minimum, include your AUM target or ideal.

1. **AUM ideal:**

*Examples:*

* *Retired or retiring soon; family-oriented*
* *At least $300,000 of assets*
* *Easy to work with and who will listen to our advice*

**What our Clients Struggle With**

This is a description of what your target clients struggle with. Descriptions should include a point of frustration, financial need or concern.

*Examples:*

* *Concerned about having enough money to retire and outliving their money*
* *Leaving a charitable legacy*

**How our Firm Solves for Client Struggles**

This is a description of the approaches, processes, attitudes, strategies and philosophies you use to help clients solve their problems.

*Examples:*

* *Generate lifetime income through various modalities including insurance*
* *Develop comprehensive financial plans using eMoney to help achieve financial independence*

**What Differentiates Our Firm**

This is a description of how you feel your firm is different from all the other firms. What about your firm makes you unique? If you have a value proposition, this is a good place to include it.

1. **Value Proposition:**

*Examples:*

* *Help you understand how we implement what you need and make it happen hassle-free by…*
* *We make the multiple strategies easy to understand by…*
* *We offer multi-generational planning and know all our clients’ extended families, including children and grandchildren*

**Our Firm Image**

This is a description of the overall image you want your firm to present. Is your firm casual? Formal? What elements and feelings do you want your clients to feel? What perceptions do you want to incite?

*Examples:*

* *We want all elements of our firm to exude luxury and imply our clients live the high-life*
* *We are a family-friendly firm. We host semi-annual pizza parties in the park where clients bring their children. We want clients to know we put their family first above all else.*

**Color Palette**

Change the colors of the boxes to those of your firm brand. Delete any unused boxes.

**Font**

List any fonts used by your firm to impact the client experience. Does your font reinforce your firm’s image? Is it easy to read both in print and online? Is it used consistently?