

ADVISORPOWER: CUSTOM GROWTH PLANS<sup>SM</sup>

## BrandPower: The Blueprint for Delivering Your Unique Edge<sup>SM</sup>

The strength of your brand determines your ability to attract, develop, and keep profitable relationships with clients, prospects, and centers of influence. Through BrandPower, you will define, build, and demonstrate a winning client experience that will separate you from the competition.

### HOW YOU BENEFIT

Excella's 12- to 14-week expert consultation will help you take these steps toward strengthening your brand:

- Clearly understand how your brand currently meets the needs of your clients
- Identify opportunities to strengthen your brand and build client trust
- Implement a customized brand development plan created by Excella
- Deliver a strong brand experience for attracting, acquiring, and developing client relationships
- Measure your success and easily fine-tune the brand experience you provide

### WHAT EXCELLA WILL DELIVER

- A written evaluation of your current brand based on how you do the following:
  - Introduce your practice to prospective clients and referral sources
  - Conduct your initial prospect discovery process and propose solutions
  - Manage existing client relationships, including semi-annual meetings, ongoing communications, and service
  - Communicate with colleagues in your firm
- An optimized brand statement to help differentiate your firm
- An action plan for strengthening your firm's brand and your client, prospect, and center of influence relationships
- Training in Excella's methodology for conducting a Total Needs Evaluation<sup>SM</sup> and delivering appropriate solutions
- Training in Excella's methodology for conducting semi-annual client reviews, which demonstrate and maximize your firm's value

Excella will also provide financial advisors and their firms with ongoing coaching for a mutually agreed-upon period of time.

HOW WE WILL COLLABORATE

To maximize BrandPower, we will ask that you collaborate with us in the following ways:

- Participate in biweekly conference calls
- Complete questionnaires and worksheets we provide to help you share information
- Permit us to interview several of your clients and colleagues
- Review and provide timely feedback on the deliverables we create for you

GET STARTED TODAY

Contact Ani Yessailian at 617 886-6001 or [AY@excellamarketing.com](mailto:AY@excellamarketing.com).