

***Two powerful services
from one solid shop.***

**Investments are insurance.
And insurance is an investment.**



**Benefit from the strength
of In-House Advisors.**



A history of excellence.

For nearly 35 years, the team at Zavits Insurance has been providing diverse and innovative solutions for our clients, from life insurance and living benefits to financial planning and even travel insurance.

Terry Zavits and her shop has built a strong reputation for dedicated, hands-on service. With a stable of longtime clients, Zavits' business model involves more personnel than standard firms for greater attention to each account.

Dedication. Perseverance. Honesty.

Now the professionals at Zavits are taking their signature approach to insurance in a whole new direction...

FINANCIAL GUIDANCE AND ANALYSIS FROM ZAVITS...

Two powerful services. One solid shop.

ARE YOU READY TO INVEST IN THE 21st CENTURY?

(KEY BENEFITS:)

- Financial and retirement planning from truly independent advisors
- Via an established, long-trusted and recognized organization
- Partnering with solid portfolio managers & investment planners
- Partnering with WealthSimple for investing on auto-pilot
- Fully-rounded, comprehensive planning (investments + insurance)
- Simplified reporting for broad client consumption.

MESSAGE POTENTIAL:

Zavits fuses modern trading innovations with traditional wisdom:
Are you ready to invest in the 21st Century?

Get investment guidance and securities analysis from professionals who understand the full financial landscape.

Achieving goals through investing acumen.

Key Insight Summary

COMPANY

Build on Success

- Integrate Zavits
- Insurance brand
- benefits:
- Independent
- Experienced
- Dedicated
- Hands-On

CATEGORY

Target Higher-End

- Distinguish a higher-dollar membership: educated clients with established portfolios or significant investment potential.
- Leverage the established Zavits reputation/history for hands-on involvement and attention to detail.

CUSTOMER

- wants retirement planning that doesn't deprive from their current lifestyle
"Build for tomorrow. Live for today."
- often overwhelmed by specifics and protocol
- simplified reporting & communication is available as needed

COMPETITION

commonly associates retirement with perpetual vacation in images, tone

- Riverbank cruises and afternoons in the park.

ALTERNATIVE APPROACH

- Appeal to ego of 'smart investors', challenging their strategy.
- 'Whether retirement is on the distant horizon or right around the corner, smart investors keep it squarely in view...'
- 'Go beyond diversifying to target a clearer strategy.'

Brand Position

Key Insight: Implementation

INVESTING WITHOUT DEPRIVING LIFESTYLE

- Preparing for tomorrow. Living for today. Financial guidance that views the full picture.
- Invest for tomorrow. Live for today. Zavits connects savvy investors with a higher standard.
- Invest wisely. Live fully.

APPEALING TO EGO OF YOUNGER, EDUCATED INVESTORS

- Savvy investors know financial advisement is a contact sport. Zavits get you off the sidelines.
- Forward-thinking financial guidance: savvy in a changing marketplace, anchored in tradition.
- Conquer tomorrow by understanding today's marketplace.

CHANGING PARADIGM

- As markets evolve and trends dissipate, the smart money is on traditional wisdom.
- Embracing change while rooted in traditional wisdom.

Competitive Positioning & Message Attributes



Vanguard[®]

“Your financial goals are about real-life needs.”

“Changing the way the world invests.”

Wide strategy aimed at mid and higher investors, broad strokes conceptually. Professional and clean.



“We’re bullish on the future. Yours.”

“Putting Our Power Behind Your Goals.”

More masculine strategy suggesting aggressive style.

Seemingly forever bullish – high confidence with strong foundation.



Edward Jones[®]
MAKING SENSE OF INVESTING

“Put the power of personal attention to work for you.”

“Making Sense of Investing”

Non-specific approach favored by large industry staples, highlighting sunny customer service and friendly advisors.

Embraces reputation of longstanding name brand associated with tradition and sustainability.

Brand Positioning Strategy

By dually focusing on:

- a) Zavits' acumen with modern trading innovations like robo advisors and WealthSimple-style partnerships.
- b) Simplifying portfolios to include insurance and investing guidance from a single provider, we combine old with new – appealing to a broader range.



YOUNGER INVESTORS

To appeal to younger investors, an irreverent, slightly offbeat tone might be best in social media or print. A wry but optimistic voice that is self-aware helps cut through the cynicism while differentiating Zavits from a crowded field. Appeal to their generational ego, as the ones who revolutionized everything: *See how the digital age has transformed investing as we know it.*

Too much emphasis on transitioning from insurance-only to both insurance and investments could undercut the message, potentially creating a misperception of being “new” to investing. It should not, however, be abandoned all together in messaging.

The “One-Stop Shop” concept helps connect both disciplines by virtue of its practicality... *Smart investors know diversifying doesn't have to mean managing a rolodex of contacts – and that there's value in keeping things simplified.*

Brand Attributes (Values)

- Experienced
- Hands-On
- Independent

Brand Position (Essence)

- Innovative One-Stop Shop
- Smarter investing
- Prepared through experience

Proof Points

- Well-established 34-year reputation
- Very long-time clients
- Partnering with leading robo advisors
- Enhanced Staffing Standards

Personality

- Rational, informed experts who understand the full landscape.
- Confident, modern and prepared.
- The professionals.

Benefits

- Educated insight
- Unbiased advice
- Higher Attention to detail

Brand Position

- Brand Attributes

- Personality

Established.
Experienced.

Skilled &
Friendly



Practicality,
Simplification

Hands-On
Attention

- Benefits

- Attributes

Brand Position

The ZAVITS Difference

Pitch Potential

Everything we do at Zavits demonstrates how we're a different kind of operation. As investment advisors, we staff-up well beyond industry standards to provide clients with a dedicated, responsive team & unparalleled attention to detail. It's why so many of our earliest clients are still with us, over three decades later.

Staffed (Partnered?) with the legal & accounting pros needed to undertake serious transactions quickly – flexible and ready to meet the client's deadline. Now we're extending our 30+ years of insurance advisement to offer financial and retirement planning to our clients. Insurance and investing, all from one solid shop. Zavits.

SIMPLIFIED, DIRECT, BROADLY TARGETED:

From investments to insurance, your portfolio deserves closer attention. Zavits: Managing More Than Money.
See why more tech-savvy investors rely on Zavits for complete portfolio management.

SOCIAL MEDIA: MORE IRREVERANT, TARGETING YOUNGER INVESTORS

Give your portfolio the spa treatment. Insurance and investments XXX
Step off the sidelines and invest in the 21st Century.

Targeted Customers

Investors of all ages, from professionals and business owners to those with more established wealth. More defined by their level of investing versus age, but with strategy aimed at appealing to younger prospects.

Those who want detached investing, without necessarily needing a complete understanding of every detail They'd rather come in and be taken care of by experts looking out for their best interest.

CORPORATE CLIENTS

- Early career: higher-end salary prospects at the start of their career

MOTIVATIONS

- Want to make the most of their opportunity, and investments
- Need guidance in a changing paradigm
- Wants to feel smart: informed, proactive, but not overwhelmed by detail

PAIN POINTS

- Wants Investing Simplified
- It's difficult to identify quality and commitment
- Investing often feels risky
- Changing directions is a large undertaking

Pitching Pain Points

SIMPLIFIED

- Translating investments. Transforming lives.
- Guidance you can understand. Tradition you can count on.
- Helping you navigate a changing landscape. Financial guidance from Zavits.

IDENTIFYING QUALITY

- Identifying quality is not complicated. Confirm reputation & longevity.
- Traditional wisdom balanced with forward thinking.
- Never before has traditional wisdom been so valuable.

Satisfied Customers – Who To Spotlight?

“Grateful of the careful
and friendly advice.”

Physician & Scientist
London, ON

“Prompt and courteous service. I
feel comfortable knowing they will
be there if I need them at a
moment’s notice.”

Physician
Edmonton, AB

More focus might be extended to include more tech-savvy clients like software developers or technicians. It buttresses confidence on the functionality of new trading platforms, and as with doctors – suggests that smarter investors chose Zavits.

Brand strategy: introduce brand

Core Roll-Out Message Potential

'Traditional wisdom' is a repeating theme, often juxtaposed against modern advances – suggesting the best of both. Use of the word 'guidance' sometimes replaces 'advisement' to offer a more personal, even friendly experience.

Dueling approaches address pain points of different target audiences. For younger and smaller investors, simplification is offered. Meanwhile for more serious investors, we highlight Zavits' hands-on business model, with more intensive attention to detail.

- Trust a firm that's not afraid to evolve alongside technology and innovation, while honoring the traditional values that made them a success for over three decades.
- *IN TANDEM*: Is your portfolio working in-tandem, with investment and insurance strategies built together?
 - Insurance. Investment. In concert. *Get everything on the same page.*
 - Are you ready to invest in the 21st Century?

Typography

The unique and adventurous nature of the name 'Zavits' could be advantageous - both in pitch and typography. It sounds modern and technically astute – and reads much like an action word.

We recommend Odalisk font for the brand

Website Mockup



General Rules for Logo use 1

Fundamentals of Logo Usage/Reproduction

Clear Separation

The immediate area surrounding any logo should be clear, and always be free of text or other graphic elements. This helps ensure the logo appears more distinctively despite the background or platform.

Quality/Size

Only high-quality copies should be utilized, without using duplicated copies where quality can deteriorate. For greatest clarity and legibility, a minimum size standards should be established for each iteration of the logo – both for online use and print.

Background

Design should firstly incorporate working well across a white background. Different versions may be needed for non-white backing where necessary. Background should be carefully considered not to counteract basic visual messaging of all components of the logo.

General Rules for Logo Use (2)

INCORRECT LOGO USAGES

Common mistakes to avoid when employing an official logo.

- Avoid recreating the logo as quality can be lost
- Never stretching or distorting the logo
- Never rearrange or break apart the letters of the logo
- Avoid adding text over a logo

Such steps help protect the integrity of both the brand & the message, as well as the technical functionality across different media.

Logo Mockups



Social Media Voice

- Confident, Energetic & Optimistic
- Business-minded, Focused, Service-Oriented

Zavits puts your complete portfolio in perspective, with advanced insight and an unmatched level of service. Are you ready to invest in the 21st Century?

Zavits balances burgeoning new innovations like robo advising against the traditions and wisdom that have made us a success for over 30 years.



The Zavits Approach: Modern Investing meets traditional wisdom. [#Insight](#)

Like Comment

Excellence through experience. Are you well advised? Zavits Financial Planning.

Like Comment

- Pointed but pleasant
- Broadly appeals to investors at all levels

Do you know someone who trusted their life savings to the wrong financial advisor? Protect yourself - go with a CFP Pro at Zavits.

Like Comment

Are your investments synched & optimized? Discover the advantages of modern financial planning.

Like Comment

Brand Activation:

TRAFFIC, LEADS & ACQUIRED PORTFOLIOS

Beyond straight sales, increased prospective activity is also a clear indicator of interest and worth. Fine-tuning strategy and messaging based on response can frequently translate into greater progress. Synching with target audiences via on-point messaging is most readily gauged through lead generation.

RESPONSE TIME

Quick turnaround in response is practical across many platforms, but most especially linked social media activity. However, frequently prospective clients respond only following repeated contact with the message.

WEBSITE TRAFFIC / SOCIAL MEDIA INTERACTION

Changes to traffic at the official website is a strong indicator, always factoring in internal reviews of a new campaign. Statistics and results become easier to translate when tracked regularly, charting progress and lapses alike. Social media response is typically more immediate, providing more opportunity for fast A/B testing of messaging, imagery and tone.