Home Page Sales Funnel

Brand Messaging Playbook

MESSAGING FRAMEWORK ELEMENTS

Your Character (The Hero):

- An individual or family, aged 40 or older, living in Mill Valley or Marin County, California (and beyond). They have experienced success and are navigating significant life transitions. They yearn for financial confidence, peace of mind, security, and a fulfilling life that's aligned with their goals, passions, and dreams.

Character Wants:

- They want to confidently manage their wealth, ensuring a sustainable and fulfilling future through life's transitions, such as retirement, investment management, estate and legacy planning, tax optimization, and funding their children's education.
- They aim to achieve peace of mind, strive to overcome financial biases and align investments with their goals, passions, and dreams.
- They actively look for opportunities to contribute to charitable causes and show support through financial contributions, since they often lack the time for volunteering.
- Their goal is to secure a sustainable financial strategy while preserving their wealth for the long term, creating a fulfilling and impactful future.

Journey of Transformation:

- **From**: Struggling with financial uncertainty, existential concerns, estate and legacy worries, investment decision overload, fear of being taken advantage of, wealth mismanagement, and overwhelmed by life's financial complexities.
- **To**: Feeling confident, secure, and fulfilled, and enjoying a life aligned with their goals, passions, and dreams, along with a positive community impact.

Problem:

- **External Problem**: Life's financial journey isn't just about numbers. It's a complex and winding path filled with uncertainties and decisions. Investments, taxes, inheritance, college funding, estate planning, and retirement are more than financial terms; they are vital decisions that shape your life. With life changes such as promotions, higher tax brackets, stock options, divorce, or sickness, the complexity grows. Navigating these aspects alone or with unqualified assistance can lead to feelings of being lost, or worse, being taken advantage of. Perhaps you've tried going it alone or seeking help from a spouse or friend, but the weight of preserving what you've earned and preparing for your future continues to bear down on you.

- **Internal Problems**: Your financial concerns are deeply personal and affect more than just your bank account. Existential worries about finding meaning, especially after retirement, or fears of outliving your money, cast a shadow on your life's transitions. Concerns about leaving a legacy and making a positive impact, health and aging anxiety, social isolation, and the guilt or pressure related to your wealth all add layers of stress and complexity. Decision overload from managing substantial wealth can feel paralyzing, and the desire to balance enjoyment with responsible decision-making is a constant struggle. You may want to donate to good causes but feel unsure how to do so responsibly. These are not mere financial decisions; they're choices that define your life's path, your peace of mind, your relationship with yourself and others, and even your self-identity. The pressure to be a good steward of your money, the need for a confidant to talk to, and the desire to start a financial plan that truly reflects your goals, passions, and dreams. It doesn't have to be a lonely battle. These feelings of stress, anxiety, and confusion don't have to be faced alone.
- **Philosophical Problems**: Dealing with the complexities of investments, taxes, inheritance, college funding, and retirement planning can be truly overwhelming. The burden of making sound financial decisions often leads to feelings of anxiety. We're here to assure you that your concerns completely valid and common. But here's the thing – you don't have to carry this burden by yourself. We'll walk this path with you, offering guidance every step of the way.

Solution:

- We believe you are an integral part of the Mill Valley and Marin County community. Your goals, passions, and dreams drive us to craft personalized plans that guide you through every twist and turn of life's financial journey. Embracing a white glove approach, rooted in genuine care and understanding, our commitment to integrity means we don't cut corners. Our personalized plans align your wealth with what truly matters to you. We're passionate about creating a purpose-driven future filled with peace, happiness, and fulfillment - a future that reflects who you truly are! Whether it's reducing environmental impact, investing in your community, helping those in need, or supporting arts and music, we connect your goals, passions, and dreams to your financial life. With Assembly Wealth, you're never alone; you're part of a family that cares about you and the world we share. Let's walk this road together, turning complex decisions into clear paths toward a financially stress-free future.

Guide:

- **Empathy:** We get it. Life's financial twists and turns can feel overwhelming. Maybe you're facing a significant life transition, striving for a fulfilling retirement, or simply feeling a tad lost in the maze of investments, taxes, and financial planning. We've seen how these challenges can create anxiety and uncertainty, but we're here to say: you don't have to face it alone. We're not just your financial planners; we're your allies, your supporters, and your friends on this journey.

- **Authority:** With a dedication to integrity, community, and sustainability, Assembly Wealth provides personalized, tailored solutions that truly align with your unique goals, passions, and dreams. Our expertise isn't just in numbers and graphs; it's in understanding people and their dreams. Since 1998, formerly known as Wrapmanager, we've been turning financial complexities into clear, meaningful paths toward peace, happiness, and joyful living. When you choose Assembly Wealth, you're choosing a partner with a proven track record, a heartfelt commitment to your success, and a genuine desire to see you thrive. We not only understand the finances but also the unique path and deeper meaning behind them. We'll help you transform the financial planning process into a personalized roadmap to a fulfilling and meaningful life.

Plan:

1. **STEP ONE: Let's Assemble with a Casual Conversation**
   Let's begin with a casual chat. No deep dives or commitments. Without any pressure on you, our purpose is to listen and comprehend your fears or concerns. Before any financial planning begins, let's figure out what's important to you. We want to get to know you, on a personal level.
2. **STEP TWO: Gentle Guidance Towards Your Goals**
   As we get to know each other, we'll ensure you feel confident and comfortable with our partnership, and when you're ready, we'll create a financial roadmap that's as unique as you are. It's not just about numbers; it's about making your money align with your goals, passions, and dreams.
3. **STEP THREE: Financial Peace of Mind**
   We'll walk hand-in-hand towards peace of mind. We'll celebrate your successes and support you through life's challenges. Your financial plan will stay up-to-date, adjusting to changing needs and goals. We believe you deserve a future where wealth and personal fulfillment coexist, guided by our dedicated partnership.

Call To Action:

Direct CTA:

- Let's Assemble
- Let's Chat
- Let's Have a Chat
- Start Your Personalized Journey
- Let's Assemble Your Perfect Plan
- Let's Assemble a Plan Together
- Start Your Journey with Us

- Let’s Assemble Your Dreams
- Let’s Create a Plan Together
- Assemble Your Future With Us
- Assemble a Secure Tomorrow
- Ready, Set, Assemble!
- Your Ideal Life, Easily Assembled
- Let’s Assemble Your Future
- Assemble a Secure Future Today
- Assemble Your Wealth, Fulfill Your Dreams
- Get Financial Confidence
- Let’s Assemble Your Future, Together!
- Assemble with Us
- Let’s Get Started!
- Achieve Peace of Mind Today
- Join Us, Let’s Assemble!
- Assemble a Financial Plan
- Let’s Assemble, We’ll Make It Easy
- Assemble Your Path to Fulfillment
- Build Wealth, Assemble Happiness

Transitional CTA:

- Lead-Generating eBook Title Ideas:
  - Assemble Your Dreams: A Step-by-Step Guide to Financial Freedom and Fulfillment
  - Live Life to The Fullest! How to Align Your Wealth with Your Passions and What Matters Most
  - # Ways to Leverage Your Wealth for Charitable Causes and Community Support
  - Financial Serenity: A Practical Guide to Stress-Free Money Management
  - Find Your Balance: A Guide to Achieving Wealth and Well-Being
  - Elevate Your Finances and Impact the World Around You - A Guide to Leveraging Your Wealth for Sustainable Change
  - How to Live Life to the Fullest with Thoughtful Financing Strategies
  - Reaching for More and Becoming Your Best Self; The Ultimate Guide to Financial Wellness
  - Your Financial Journey of a Lifetime - A Guide to Crafting and Maintaining Your Ultimate Wealth Plan

Agreement:

- **We Understand You**. Your goals, passions, and dreams aren't generic. Neither is our approach. We tailor financial plans personalized for you and your unique life.

- **We Work With You**. We're not just your advisors; we're your partners. We'll collaborate with everyone involved in your financial life to build a plan that works for you.
- **We're an Open Book**. No hidden fees. No confusing jargon. Just clear, honest guidance. You'll always know where your money's going and why.
- **We Share Your Goals**. Whether it's responsible investing or supporting a cherished cause, we help your money reflect what matters most to you. Your goals are our goals.
- **We See the Big Picture**. From planning for retirement to gifting to your favorite charity, we take care of all the financial details, so you don't have to.
- **We're Here for You**. Have a question? Need advice? Just want to talk? We're always here, ready to listen and help. We'll pick up on the first ring and never send you to voicemail.
- **We Think Long Term**. Your future isn't built overnight. We're here to grow and protect your wealth, not just for tomorrow but for generations to come.
- **We Feel You**. Money isn't just numbers. We understand the hopes and fears behind your financial choices and we're here to guide you with empathy and expertise.
- **We Help You Make a Difference**. You want to leave the world a little better than you found it. So do we. Let's find ways to make your money do good.
- **We Keep You Safe**. Your trust means everything to us. That's why we go above and beyond to ensure your information and investments are secure.

Successes:

When a client works with Assembly Wealth, a successful experience equates to:

- **Finding Your Financial Footing**: Imagine having a crystal-clear view of where you stand and a roadmap guiding you toward your dreams. That's what we offer – a sense of financial clarity and confidence that lights your path forward.
- **Your Retirement, Your Way**: Your retirement should be as unique as you are. We'll help you build a personalized strategy that resonates with your dreams, passions, your comfort level, and your lifestyle, making your retirement a fulfilling and purpose-driven journey.
- **A Guiding Hand When You Need It**: Our Certified Financial Planners and Wealth Managers are more than experts; they're your allies. Whatever comes your way, expected or unexpected, we'll be right there with you, helping you navigate with ease.
- **Enhancing Your Wealth, Protecting Your Peace of Mind**: Proactive and mindful, we'll manage your wealth with strategies like tax optimization and risk mitigation. It's not just about growing your funds – it's about giving you the peace of mind to enjoy your life fully.
- **Leaving a Mark That Matters**: We'll help you plan, give back, and create something lasting that reflects your goals, passions, and dreams and impacts both your family and the wider world.

- **Secure Today, Dream for Tomorrow**: With us, your financial security is more than numbers. It's the comfort of knowing that your financial future aligns with your dreams and goals, allowing you to sleep easy and dream big.
- **Simplify and Enjoy Life**: We handle the financial complexities so you don't have to. By streamlining your financial management, we take off the admin burden, leaving you free to savor life's joys.
- **Retirement as Your Adventure**: With your finances solidly planned, your retirement becomes an open road. Pursue your passions, explore the world, or discover new hobbies. You've worked hard for your success. You deserve a fulfilling and enriching lifestyle after retirement.
- **Empowered Decision Making**: Knowledge is power, and we equip you with both. You'll become an informed and confident decision-maker, taking charge of choices that enrich your life and financial well-being.

Failures:

If a client doesn't work with Assembly Wealth, they risk failure by:

- **The Opportunities That Slipped Away**: It's not just about what you gain, but what you might miss. Without a thoughtful approach to tax optimization and investment diversification, those golden opportunities for growth could slip right through your fingers.
- **One-Size-Fits-All Plan**: Your dreams are uniquely yours, so why settle for a generic plan? Without tailored financial goals, you might end up on a path that doesn't truly align with what you aspire to achieve.
- **Retirement Uncertainties**: What happens if your savings don't last as long as your retirement? The fear of outliving your funds is real, and without adequate planning, it can cast a shadow over your golden years.
- **A Storm of Stress and Doubt**: Without professional guidance like the partnership you find with AW, the emotional strain and uncertainty can become overwhelming. It's a storm that you don't have to weather alone.
- **Leaving Behind Less Than You Hoped**: Your legacy is about more than money; it's about meaning. Without effective planning, you might miss the chance to leave behind something truly impactful for those you love and the causes you care about.
- **Unseen Risks, Unexpected Costs**: Without considering long-term care planning and insurance, vulnerabilities can arise, unexpectedly draining your finances. It's about seeing the risks before they find you.
- **Investments That Fall Short**: Your investments should be working for you, but without expert management, you could be facing lower returns and higher risks. It's a gamble you don't have to take.
- **Time Lost, Joy Diminished**: Managing finances alone is like a puzzle with pieces that don't quite fit. The time and burden of handling complex financial matters can pull you away from what truly brings you joy and fulfillment.

SALES SCRIPTS

FULL SCRIPT

Understanding you want to enjoy life without the constant worry about money is central to our mission. The complexities of managing wealth, planning for the future, and aligning financial decisions with your unique goals can be overwhelming.

We also know financial complexities create stress, anxiety, and a sense of feeling lost. We've seen how financial confusion can overwhelm and create barriers to the financial stress-free life you really want, leaving you feeling like you've lost control.

We are committed to guiding you through a comprehensive wealth management process that aligns with your goals, passions, and dreams. With a personalized roadmap coupled with our expertise, we've empowered countless individuals and families to make informed decisions, providing them with financial security and peace of mind for every stage of life.

Your goals are our goals and because of this, you can expect first-class, empathetic, honest, and tailored support from a team that genuinely cares about your success. We firmly believe in providing you with white glove service, rooted in genuine care and understanding, throughout our partnership. With Assembly Wealth, you are valued and never alone.

You’re part of a family that cares about you and the world we share. We ask you to call us, whenever you need a friend. When you do, we will promptly answer the phone, ensuring you never have to wait or deal with voicemail. With every interaction and every decision, we’re by your side, championing your financial journey at every stage.

Here's how we'll help you create your financially secure future:

1. **STEP ONE: Let’s Assemble with a Casual Conversation**
   Let’s begin with a casual chat. No deep dives or commitments. Without any pressure on you, our purpose is to listen and comprehend your fears or concerns. Before any financial planning begins, let’s figure out what’s important to you. We want to get to know you, on a personal level.
2. **STEP TWO: Gentle Guidance Towards Your Goals**
   As we get to know each other, we’ll ensure you feel confident and comfortable with our partnership, and when you’re ready, we'll create a financial roadmap that's as unique as you are. It's not just about numbers; it's about making your money align with your goals, passions, and dreams.
3. **STEP THREE: Financial Clarity & Peace of Mind**
   We will walk hand-in-hand towards your financial stability and peace of mind.

> We'll be with you every step of the way, celebrating your successes and supporting you through life's challenges. You deserve a future where financial security and personal fulfillment coexist beautifully.

Managing your wealth isn't just about numbers; it's about securing your and your family's future, supporting your passions, fulfilling your dreams, and enjoying peace of mind. You don't have to tackle the complex world of finances alone. Let Assembly Wealth be your trusted guide, ensuring you can live life fully and be rest assured in your financial journey.

We're here to listen and gently guide you through this process. We'll start with a pressure-fee casual conversation, as your first step towards your financial peace of mind. As our relationship deepens, our goal is to make you feel completely at ease and confident in our collaboration.

With your success as our driving force, we'll work together to craft a financial roadmap that's as unique as you are. We'll walk this road together, turning complex financial decisions into a secure future that aligns with your goals, passions, and dreams.

ELEVATOR PITCH

Assembly Wealth In 30 Seconds

- Worrying about life's financial twists and turns, planning for the future, and making investment decisions is overwhelming. But, you don't have to tackle the complex world of finances alone. Assembly Wealth is your trusted guide, ensuring you can live life fully and be rest assured in your financial journey. We believe wealth management isn't just about numbers; it's about securing your family's future, fulfilling your dreams, and enjoying peace of mind.
- You shouldn't have to navigate financial complexities alone. You deserve a first-class partner who sees beyond the numbers and supports your dreams so you can turn confusing financial planning into an inspiring adventure. Assembly Wealth not only understands the finances but also the unique path and deeper meaning behind them. We'll help you transform the financial planning process into a personalized roadmap to a fulfilling and meaningful life.

ONE-LINER

- Navigating life's financial twists and turns doesn't have to be daunting. At Assembly Wealth, we provide white-glove financial services, rooted in genuine care and understanding, for the Mill Valley and Marin County communities. Our team is dedicated to creating personalized wealth management strategies that align with your goals, passions, and dreams, ensuring financial security and peace of mind at every stage of life.

TAGLINES

- Life's Wealth, Your Way
- Let's Assemble Together
- Your Goals Are Our Goals
- Embrace Prosperity, Enjoy Serenity
- We're With You at Assembly
- Your Fulfillment Journey Starts Here
- Assemble with Us
- Meet, Share, Grow
- Assemble Your Community Here
- Find Your Spark, Assemble with Us
- Assemble Ideas and Inspiration with Us
- Let's Rally Together at Assembly
- Shape Your Future, Your Way
- Let's Assemble Together
- Financial Well-Being with a Personal Touch
- Assemble with Us
- Assemble a Confident Future
- Your Fulfillment is Our Commitment
- Unlock Your Personal Wealth-of-Life with Assembly Wealth
- Planning Your Wealth, Shaping Your Life
- Assemble a Future of Financial Empowerment
- Assemble Your Path to Well-Being
- Accumulate Confidence: Financial Plans Assembled for You
- Assemble a Wealth of Life: Well-Being, Prosperity, Fulfillment
- Let’s Assemble Your Path to Well-Being, Prosperity, and Fulfillment
- Turning Your Financial Maze into a Purpose-Driven Path
- Beyond Numbers: Navigating Life's Rich Journey
- Financial Clarity for a Fulfilling Tomorrow
- Personalized Wealth Management for Life's Great Adventures
- Where Your Wealth Meets Your Aspirations
- Building Financial Peace, One Dream at a Time
- Navigating Life's Twists with Confidence and Grace
- Wealth Management, Tailored to Your Unique Story

HERO STATEMENTS

- Enhancing Your Wealth, Protecting Your Peace of Mind
- Your Wealth, Your Dreams, Our Expertise
- Crafting Your Financial Future, One Dream at a Time
- Turning Your Financial Aspirations into Reality, Together
- Tailored Strategies for Your Unique Financial Journey

- Wealth Management with Heart and Expertise
- Your Financial Dreams Matter to Us
- Navigating Your Wealth Journey with Care and Commitment
- More Than Numbers: Where Your Dreams and Wealth Align
- Financial Confidence Begins with Assembly Wealth
- Our White Glove Approach to Your Financial Aspirations
- Personalized Wealth Strategies for Life's Every Turn
- Unlocking a Brighter Financial Future, Together
- Wealth Planning with a Personal Touch
- Where Mill Valley and Marin County's Dreams Flourish
- Financial Peace and Fulfillment, Crafted Just for You

HOME PAGE HERO HEADERS & SUB-HEADERS

- **Header**: Enhancing Your Wealth, Protecting Your Peace of Mind
- **Sub-header**: We firmly believe you deserve white glove service, rooted in genuine care and understanding, along with a personalized wealth management plan that ensures financial protection and peace of mind through every stage of life.

- **Header**: Your Wealth, Your Dreams, Our Expertise
- **Sub-header**: We remove the stress of financial planning and provide white glove services, rooted in genuine care and understanding, and personalized wealth-management solutions that truly align with your unique goals, passions, and dreams through every stage of life.

- **Header**: Crafting Your Financial Future, One Dream at a Time
- **Sub-header**: We offer a first-class tailored wealth management experience to help you connect your goals, passions, and dreams to your financial life.

- **Header**: Wealth Planning with a Heartbeat
- **Sub-header**: Personalized, precise, and always with your best interest at heart. Our white-glove wealth management approach, rooted in genuine care and understanding, takes the weight off your shoulders and aligns your goals, passions, and dreams with reality.

- **Header**: Turning Your Financial Dreams into Reality, Together
- **Sub-header**: We align your financial goals with what truly matters to you, ensuring peace, happiness, and fulfillment through every stage of life.

- **Header**: Financial Peace, Tailored to You

- **Sub-header**: Our white glove wealth-management services, rooted in genuine care and understanding, ensure that every detail of your financial journey is handled with precision, care, and a personal touch.

- **Header**: Wealth Management with Heart and Expertise
- **Sub-header**: We provide white glove wealth management services for the Mill Valley and Marin County communities, making financial dreams a comforting reality.

- **Header**: Unlocking A Brighter Financial Future, Together
- **Sub-header**: Step into a world where your wealth aligns seamlessly with your goals, passions, and dreams. Our white-glove touch, rooted in genuine care and understanding, ensures peace of mind at every turn.

- **Header**: Where Your Dreams Flourish
- **Sub-header**: Personalized wealth strategies designed to align your goals, passions, and dreams with financial security and peace of mind.

- **Header**: Navigating Your Wealth, Hand in Hand
- **Sub-header**: With our white glove service, expertise, and genuine care, your financial journey transforms into a comforting and enlightening adventure.
