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Assembly Wealth Rebrand & Sales Funnel

Marketing Campaign Kit

Cement Your Brand in Your Audience's Mind

This campaign kit contains the components of your sales funnel. Most importantly, links to your brand messaging framework.

Keep in mind:

- Your company must repeat its message to become known and heard.
- People recognize and remember your brand because they've heard your message multiple times.
- This document contains the message for your team to repeat.
- The elevator pitch and sales scripts addresses your customer's problems.

Your Mission

Use the language in your messaging framework.

Step 1: Leadership and team should memorize and repeatedly share the message for prospects to understand and remember your services.

Step 2: Use the language in the script in your sales and marketing.

Step 3: Keep repeating the message, even if you're tired of hearing it.

Without developing a well-crafted elevator pitch or tagline that's consistently repeated, customers won't remember what you offer.

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Assembly Wealth Sales Funnel Campaign Kit

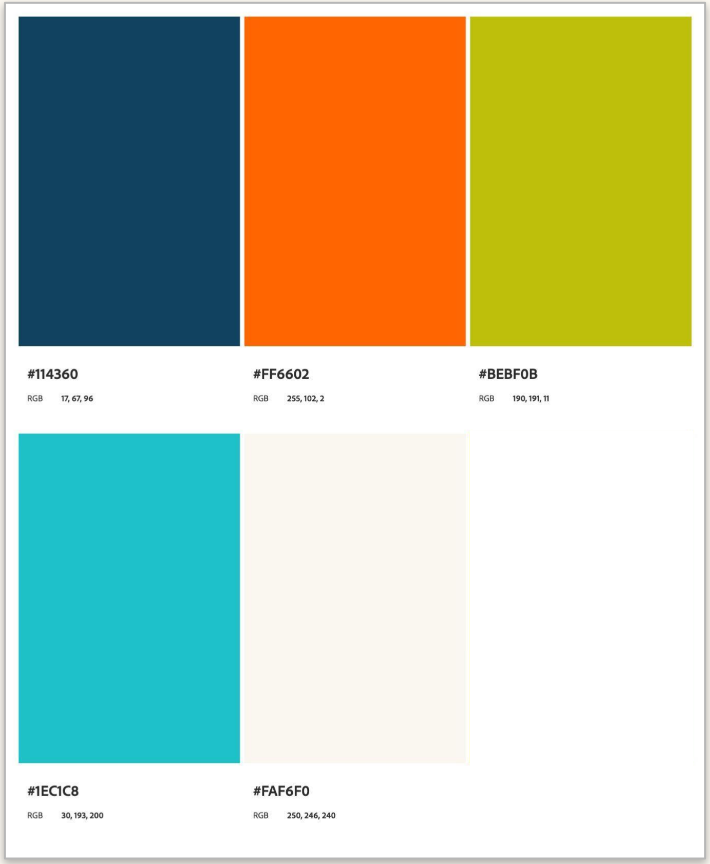
The sales funnel creation process has been completed. The elements of the sales funnel include:

1. Determined sales funnel campaign goals.
2. Audience's problems have been identified during the message workshop in order to create the framework.
3. A brand script has been written to clarify the message to use with prospective clients.
4. A sales funnel website page (home page) that follows a proven storytelling framework.
5. PDF/ eBook for lead-generation.
6. eBook email series to nurture and sell.
7. Blogs to educate and grow website traffic.
8. Announcement and follow-up emails to build trust.
9. Social media posts to promote and share.
10. **NOW it's time to announce Assembly Wealth!**

Colors

- Navy
- Orange
- Lime Green
- Aqua
- Off-White

White is used as an accent and off-white is the background
Navy blue is used instead of black



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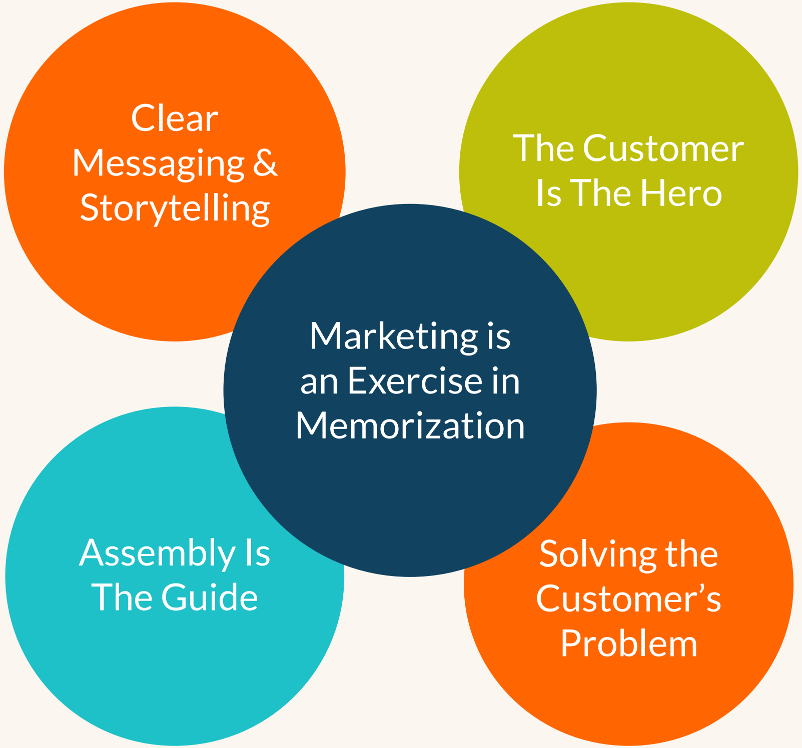
Messaging Framework

To understand the problems your brand is solving, we kicked-off our project with a 2-hour Messaging Workshop.

From there, we created the BrandScript. You'll use this script every time you talk about your company.

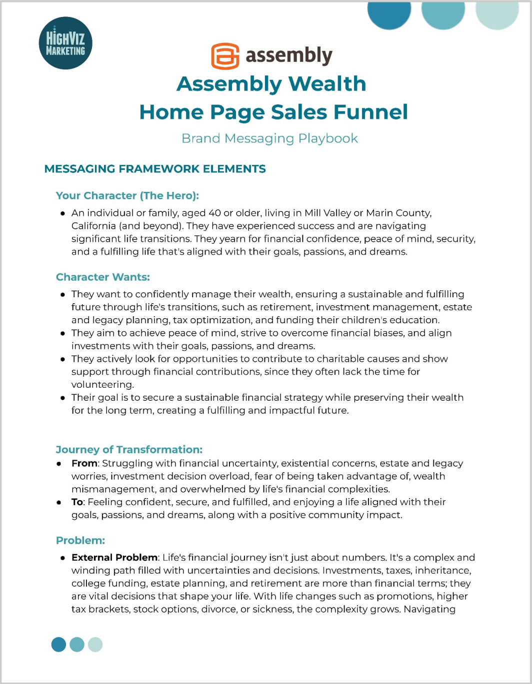
Read. Learn. Memorize. Repeat.

Brand Messaging Playbook PDF



One Liner

Navigating life's financial twists and turns doesn't have to be daunting. At Assembly Wealth, we provide premium financial services, rooted in genuine care and understanding, for Mill Valley, Marin County communities, and beyond. 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.



HighViz Marketing

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Assembly Wealth
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

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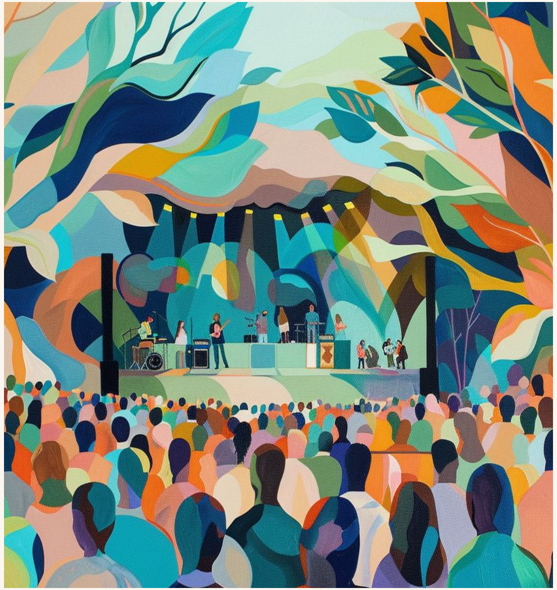
Elevator Pitches

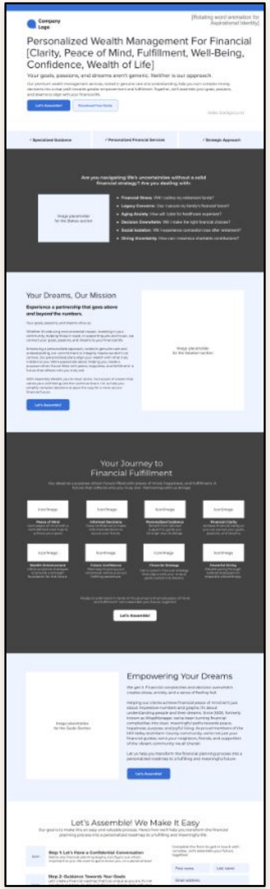
Worrying about life's financial twists and turns, planning for the future, and making investment decisions is overwhelming. But, you don't have to tackle the complex world of finances alone. Assembly Wealth is your trusted guide, ensuring you can live life fully and be rest-assured in your financial 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 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.



Wireframe

[Website Page Wireframe Draft_PDF]



Header/CTA

Value Statements

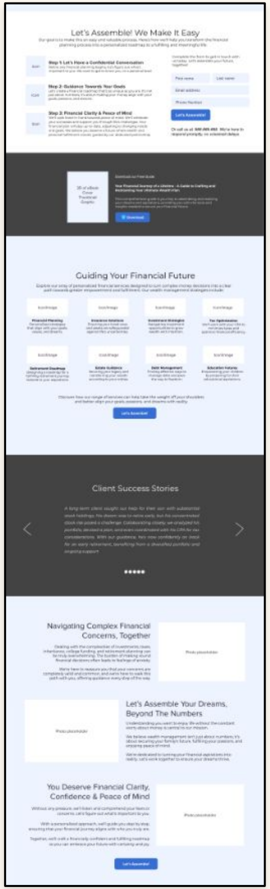
Stakes

Solution

Product Solutions

CTA

Brandscript & Value Statements



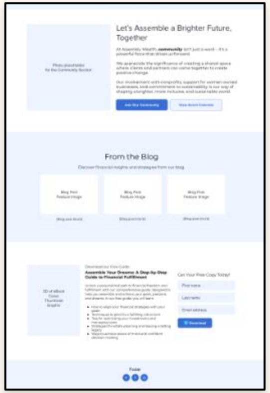
The Plan

Lead Gen

Benefits of Working With Us

Testimonial

Overcoming Objections



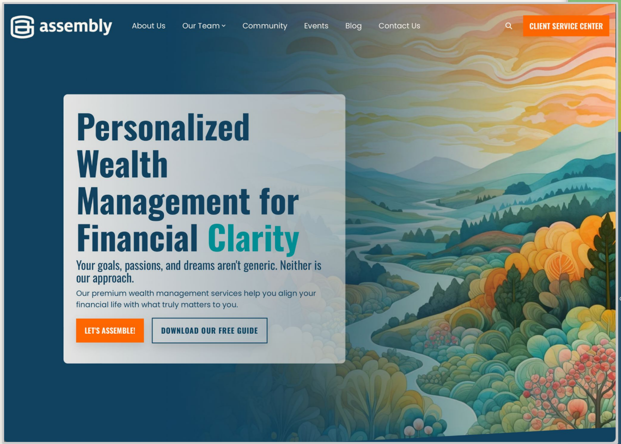
Our Community

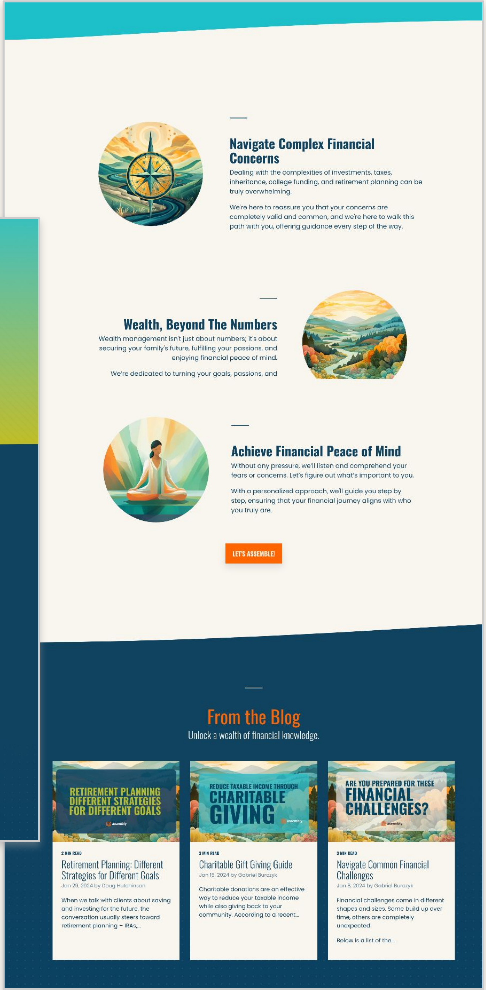
Blog Posts

Lead Gen

Website

www.letsassemble.com





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eBook

Your Financial Journey of a Lifetime

A Guide to Crafting and Maintaining Your Ultimate Wealth of Life Plan

[Landing Page]
[Thank You Page]
View the eBook [here]

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Email Series

- #1: Download eBook
- #2: Problem + Solution
- #3: Overcome Objections
- #4: Testimonial
- #5: Sales Letter

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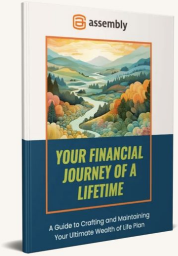
Dear Smart Investor,

Thank you for downloading ***Your Financial Journey of a Lifetime: A Guide to Crafting and Maintaining Your Ultimate Wealth of Life Plan***.



You can re-download your free eBook anytime by clicking here.

Our mission is to assist you in pursuing the life you envision—a life where you are well-prepared for retirement, shielded from unnecessary financial risks, and capable of leaving a meaningful legacy.

If you have any questions, please don't hesitate to contact me via email at hello@letsassemble.com or give me a call at 415-541-7774.

Sincerely,
Declan Lynch

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CTAs & Feature Images