

To stand out in an increasingly competitive industry, you need to make the most of every opportunity.

# WE MAKE EVERY WORD MATTER.

Winning the game in asset management is a tough challenge. Unpredictable markets, new competitors, and higher client expectations mean that you have to work harder to earn and keep every dollar under management.

At every step of the way, it's critical to tell your distinct story in language that is clear, credible, and compelling. That's where we come in...

We invented

**LANGUAGE STRATEGY®**

We're a Language Strategy firm founded on the idea that it's not what you say that matters, it's what people hear. We're masters at finding exactly the right words to maximize the effectiveness of messages, change behavior, and drive action.

## WE HELP ASSET MANAGERS FIND THE WINNING LANGUAGE TO:

### STAND OUT

In this market, being the best is often not enough. We help you bring to life the key elements of your distinct proposition so you can tell your most powerful story – for your brand, product portfolio, or an individual product.

### AQUIRE AND RETAIN CLIENTS

Sometimes the key to winning, keeping, and expanding relationships lies in small moments of trust. We help you see the world from your clients' perspective and find the messages and actions that help ensure clients feel, trust, and embrace the value you deliver.

### REFRAME PERCEPTIONS

Every organization carries the legacy of past experience or reputation. And old narratives die hard. Often the key to unlocking future opportunity lies in reframing perceptions from the past. We uncover barriers to purchase so we can reframe the conversation and build consideration.

With us, you get a strategic partner with deep expertise across the asset management sector. From consulting to robust research capabilities to execution of client materials, we have helped many of the leading asset managers and wealth managers find exactly the right language to drive results.

## OUR WORK SPANS...

### Asset Classes

Alternatives, ETFs, private credit, life insurance and annuities, models, SMAs, structured products, sustainable investing & more

### Advisor Needs

New client acquisition, effective client reviews, proposal development, finals presentations, client retention strategies, among others

### Topics

Communicating risk, volatility, value, fees, planning, wealth transfer & more

# How we've helped some of the biggest names in financial services and asset management



## THE LARGEST STUDY OF THE LANGUAGE OF FINANCIAL SERVICES EVER CONDUCTED

Over more than 15 years, 20 studies, and 20,000+ interviews on three continents, we've worked with Invesco Global Consulting to help financial professionals communicate more effectively with their clients.



PRIVATE BANK

## RELAUNCHING A DISTINCTIVE BRAND

We helped J.P. Morgan Private Bank connect with a younger generation of the ultra-high net worth, and stand out in a sea of sameness.



## PRODUCT

We helped Goldman Sachs stand out in a crowded space by establishing a new subcategory of ETFs. By simplifying a complex proposition and focusing on tangible benefits, the launch became one of the most successful ETF debuts ever.



## ENGAGING INTERMEDIARIES AS BRAND AMBASSADORS

Chubb needed to overcome the "spreadsheet" to demonstrate why clients should pay more for its coverage. We developed a new positioning and a thought leadership platform designed to turn brokers into advocates for the brand.

## HOW WE WORK:

### RESEARCH

To find the exact words to make your audiences listen, care, and act, we have developed a full suite of qualitative and quantitative research methodologies, grounded in the behavioral science of communication. These pioneering approaches are purpose-built to uncover your audiences' beliefs, biases, and barriers and pinpoint the messages that move them.

### STRATEGY

Success or failure in business is often determined by the ability to effectively communicate your message. Our job is to give you a clear, actionable plan including what to say, what not to say, and why it matters, so we can translate your business objective into a successful outcome.

### ACTIVATION

Even the best language strategy only helps if it's executed—and executed consistently. We help you drive alignment, adoption, and consistency throughout your organization and with your external partners, ensuring everyone is on the same page.

### CONTENT

As message specialists, speechwriters, and content strategists, we help you bring your language to life. So, whether you need an immediate crisis response, compelling copy for a web launch or brand campaign, or insight-based thought leadership, we can be your partner.

## CONTACT US FOR MORE:



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