



CAPITAL VELOCITY GROUP

Branding Checklist

MISSION

What is your firm's mission? The mission behind your company describes WHY you are in business. What is your daily objective? (Hint...it's not performance related!) It's about how you will help people and what you stand for in the pursuit of getting them there. Having a strong mission and purpose for your firm is critical for your success and serves as an important pillar for your brand.

STORY

It's story time! That's right, having a story about you as the investment professional is more important than your company. You and your team are sum of the company. People are ultimately investing in you and your unique personae. It needs to be relatable and/or personal to your ideal investor. Your clients want to know how you got to where you are from life experiences; both personal and professional, not just where you plan to go.

TRANSPARENCY

Clients want to work with people who they can trust. This all starts with trustworthiness and your solid reputation as an investment professional. You are the face of your brand so be authentic and open to further validate your integrity.

VALUES

Your values are the principles that guide you and serve as another pillar to your brand. Values not only determine your priorities and ethics but also represent the way you live and work. Your investors want to work with people whose values align with their own.

BALANCE

Balance is essential. You want strike the balance between being professional and serving as a trusted friend. This means speaking their language and avoiding the "fancy-sh'mancy" financial jargon. Balance in your work environment is also important and reinforces to clients that your firm is different than others.

Unable to check off a Box?

CAPITAL VELOCITY GROUP CAN HELP YOU ANSWER YOUR QUESTIONS AND FURTHER DEVELOP YOUR BRAND. CONTACT US TODAY.