

Creating a Brand as an Independent Financial Professional

The transition to independence brings new opportunities for financial professionals and the way they serve their clients. The ability to create your own brand is an exciting venture and will lay the foundation for your organic growth as an individual business.

Working under a wirehouse can prohibit or limit you from engaging in business on your terms. Many financial professionals are hindered by these limitations and uncertainties.

Dean Packard, Scott Lowder, and Vytas Maginnis acknowledged the move from wirehouse to independent was necessary to continue the level of service they wanted to provide for their clients. The next step seemed overwhelming and they needed guidance—how do they establish a credible DBA to match their experience and resonate with the clients that make up their \$1B business?

THE SOLUTION

Once Dean, Scott and Vytas decided the time was right for their move, a dedicated team of Cetera marketing professionals partnered with them to create a full brand identity with accompanying digital presence. The three-month process started with an exploration discussion and resulted in:

- Established brand identity including logo, colors, fonts, vision, mission, core values, and imagery
- Personalized copy, design and build of website and social media pages
- Multi-channel client communication plan supported by new thought leadership and [external media](#)

Upon affiliation day, the website was launched and client communication was triggered as soon as the team cleared with FINRA. In just two months, the overwhelming majority of the team's clients have already made the transition with Harvest Wealth or are in process of doing so. Dean credits much of the team's success to this process, with "noticeable differences in the way we can now communicate with clients, sharing information on our beautiful website, in social media, and through email in a way we never could before".

You've built your business. Now build your brand.

Contact the Business Development team at 800.336.8842 to find out how Cetera can help you with personalized marketing services.

"Cetera's established marketing and growth resources are industry-leading and helped us envision a better future for our practice and for our clients."



**Dean Packard, Scott Lowder
& Vytas Maginnis***

Financial Advisors
Harvest Wealth
Cetera Advisor Networks

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