Live in Vision
Maximize Your Brand

What is Your Vision?
Note what gives your work meaning, purpose & is personal to you.

How Does Your Vision Help Define Your Brand Personality?
See pg. 5 for the Brand Personality chart.

What Do Clients Say?
Write down the *specific* adjectives your best clients use to describe what you do and what they value.

***What Else Defines Your Brand*?**
On the next page, write down 2 - 5 things that differentiate you from other advisors.
Use the following categories to help clarify how you are unique:

- What you do - that's different
- Client groups you focus on
- How you price or serve
- COI's you work with
- Interests/hobbies/clubs/volunteer work
- Specialized skills/certifications
- Personal story/background
- Passions/values

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My Differentiators:
Note only what truly differentiates you, don't feel pressured to list 5.

1.

2.

3.

4.

5.

Additional Exercises to Help Clarify & Refine Your Brand

Think about your actions and daily work with clients.
How is your work an example of your brand?

Think about your various clients groups or demographics.
What are the common themes across client groups?

Think about your written, digital & verbal communication.
What brand have you been communicating so far?

Look at what you've written in these exercises and other sources that inform your brand (i.e. Vision Statement, Business Plan, etc…)
What brand is emerging?

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Use everything you've done so far to capture your brand & business strategy

Note: If you have not done significant work on developing your brand, don't feel pressured to make it perfect. Capture the main ideas. It will become more clear as you work on it.

Your Brand:

My Brand Personality

My Brand Promise

My Brand Position

Your Brand Drives Business Strategy

What you do:

Who you serve:

How you differ:

Values you deliver:

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Execute Your Brand

Message & Communication
Review all forms of communication. Refine as needed to communicate your Vision & Brand consistently.
What, if anything, can be improved?

Client & Prospect Experience
Review what your clients & prospects experience from your actions. Refine as needed to reinforce your Vision & Brand in your actions & their experiences.
What, if anything, can be improved?

Business Strategy
Review your business plan. Focus on what will reinforce your Vision, your Brand and **what is most important** to your clients & prospects.
What, if anything, can be improved?

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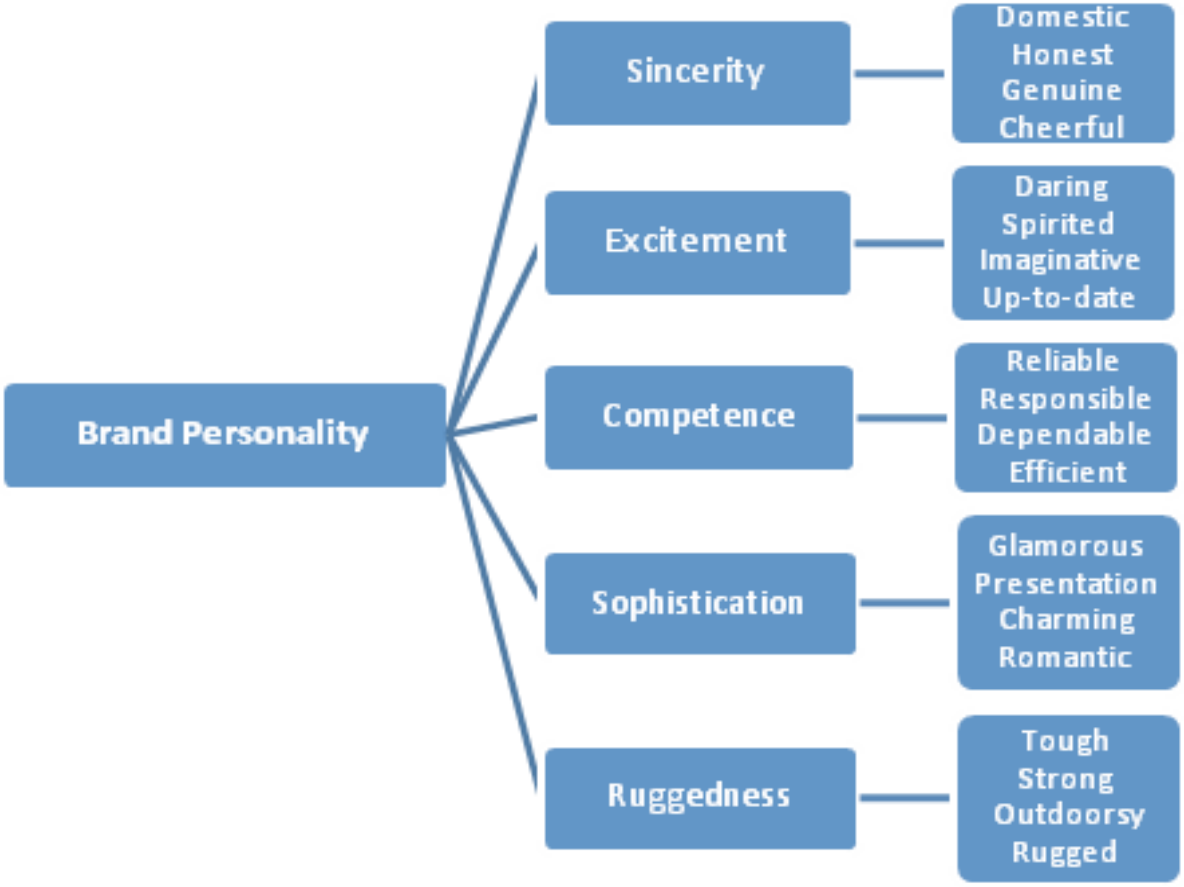
5 Types of Brand Personality

Jennifer Aaker

Dimensions of Brand Personlity, Aaker JMR Aug. 1997



Dimensions of Brand Personality of Aaker (1997)

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