



# **BRAND LANGUAGE**

Gretchen Meyer Financial Group/Pachira Wealth Management

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# INTRODUCTION



GRETCHEN MEYER FINANCIAL

As Gretchen Meyer Financial (GMF) becomes Pachira Wealth Management (PWM), consistent brand language is crucial to keeping current clients comfortable in addition to inviting prospective clients as the transition occurs.

While PWM has a similar vision and customer-driven approach as GMF, the narrative moving forward should be more team-oriented and professional, ensuring the client will continue to be well taken care of by the advisors and team members at PWM. Creating and using language that is cohesive and confident will instill trust in both current and potential clients through the transition.

Through a brand narrative audit, our team reviewed all current brand guidelines, website copy, and other collateral to assess keywords and phrases in addition to streamlining the language.

The overall takeaway is that GMF moving into PWM has a strong mission of providing comprehensive financial planning services while remaining accessible and collaborative. The suggested language edits aim to make the content concise and approachable while remaining cohesive across all platforms.

# ELEVATOR PITCH

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## CURRENT CLIENTS

As Gretchen Meyer Financial becomes Pachira Wealth Management, we want you to know that our team will continue to be fully dedicated to you and your customized financial strategy. We know you have options when it comes to financial management and we want to honor your commitment by ensuring that your experience with us will only improve as we move through this exciting transition. We welcome and are open to your questions at any time!

## POTENTIAL CLIENTS

Pachira Wealth Management is dedicated to helping people understand their options and learn about financial planning in a down-to-earth, accessible way to feel empowered and in control of their unique financial goals. We focus on developing trusting relationships with our clients while guiding them through the wealth management and investment process with one goal in mind—their success.

## FINANCIAL ADVISOR RECRUITMENT

Pachira Wealth Management is an established wealth management and financial consulting firm dedicated to providing personalized financial guidance and support. Originally founded by Gretchen Meyer, MBA, CFP® in 2014, Pachira Wealth Management now serves millions in brokerage and advisory assets through LPL Financial for clients across the United States. Our vision is to grow from \$100 million to \$1 billion in assets under management while delivering exceptional financial services, driven by excellence, synergy, and an unwavering commitment to our client's success and team's fulfillment.

## MISSION STATEMENT

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Pachira Wealth Management is an established wealth management and financial consulting firm dedicated to providing personalized financial guidance and support. We partner with you to achieve financial freedom throughout life's milestones, empowering you to pursue your dreams with confidence, while seeking a secure and prosperous future for you and your loved ones.

Our team of talented and diligent financial professionals is here to help you understand your financial picture, navigate life changes, and satisfy the goals unique to you and your lifestyle.

Originally founded by Gretchen Meyer, MBA, CFP® in 2014, Pachira Wealth Management now serves millions in brokerage and advisory assets through LPL Financial for clients across the United States.

## **BRAND PROMISE**

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Our brand promise is to offer clients peace of mind by delivering expert financial guidance that's collaborative, accountable, and leads to lasting financial freedom.

## **VISION STATEMENT**

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Our vision is to grow from \$100 million to \$1 billion in assets under management while delivering exceptional financial services, driven by excellence, synergy, and an unwavering commitment to our client's success and team's fulfillment.

To make our vision a reality, we need to consider the following:

- Maintaining a Client-Centric Focus
- Strategic Growth and Team Development
- Maintaining Accountability and a Sense of Trust with Clients and Partners
- Effective Branding/Marketing to Emphasize Core Values
- Pursuing Measurable Milestones
- Supplying Actionable Client Education
- Obtaining Client Referrals
- Pursuing Innovation and Continuous Improvement

## **EXISTING WEBSITE RECOMMENDATIONS**

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Pachira Wealth Management is dedicated to helping people understand their options and learn about financial planning in a down-to-earth, accessible way so that they feel empowered and in control of their family's well-being.

Whether preparing for retirement, starting a college savings fund, or becoming financially independent, our advice focuses on building our clients' confidence around financial matters and on working toward their unique financial goals, one step at a time.

The Pachira Wealth Management team understands how challenging, and sometimes emotional, the topic of personal finance can be for many people.

We focus on developing trusting relationships with our clients while guiding them through the wealth management and investment process. We respond with empathy, and without judgment, establishing ourselves as a team with one shared goal—your success.

# EXISTING BRANDED DOCUMENT RECOMMENDATIONS

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## CUSTOMIZED FINANCIAL PLANS

Our process for creating your customized financial plan is meticulous and comprehensive. We spend the time it takes to discover and understand every aspect of your financial picture, to best support you as you pursue goals. We respond with empathy, and without judgment, establishing ourselves as a team with one shared goal—your success.

## FINANCIAL CONSULTING & INVESTMENT MANAGEMENT

Tap into the expertise of the Pachira Wealth Management team so that you can have confidence knowing your investments are managed by industry professionals.

## FINANCIAL FOUNDATIONS PROGRAM

Pachira Wealth Management's Financial Foundations program empowers you with the knowledge and tools that strive to build a solid financial plan and turn your dreams into reality.



## EXTERNAL LANGUAGE SUGGESTIONS

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### KEY WORDS

Synergy	Improvement	Advancement	Navigate
Excellence	Powerful	Collaborative	Custom
Attentiveness	Measurable	Expert	Comprehensive
Curiosity	Accountable	Freedom	Meticulous
Hustle	Trust	Explore	Prosperous
Empower	Achievement	Curiosity	
Growth	Steadfast	Confidence	
Innovation	Commitment	Diligent	

# TRAMPOLINE

ADVERTISING & DESIGN Co

## QUESTIONS?

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**GRETCHEN MEYER FINANCIAL GROUP /  
PACHIRA WEALTH MANAGEMENT**

**2024**