

Take Your Marketing to a Higher Level



*The stakes are high to attract new clients.
Does your marketing help or hinder your efforts?*

As every financial advisor knows, it's a competitive market for gaining and retaining clients. You need to bring your message home to clients and prospects through distinctly focused marketing communications.

Westcott Associates Marketing & Media understands advisors, their mission and goals, and their desire for independence. We can help you develop a compelling marketing and communications program that builds on your firm's strengths and draws new clients to your firm.

Build on Our Expertise

Westcott Associates is a boutique marketing firm that specializes in working with financial services firms. We have extensive experience in assisting wealth managers, financial advisors, broker-dealers and RIAs sharpen the focus of their marketing, public relations and online communications.

Founded in 2010, Westcott Associates draws on decades of expertise from marketing, public relations and media professionals who know the financial services industry. Our team includes award-winning writers, graphic designers, web developers, public relations experts and social media specialists.

Our founder, David Westcott, has served as marketing director for Morgan Stanley, Citigroup and Smith Barney. He helped launch Dynasty Financial Partners and worked closely with Dynasty teams from 2011 through 2015. This wealth of experience led David to realize that financial services firms need to raise their marketing efforts to compete effectively.

DELIVERING THE SERVICES YOU NEED

We build on our knowledge of the financial services industry to support financial advisors as they transition to independence and to help established firms refresh their image and marketing efforts. We design exclusive brands and related materials, develop social media and marketing strategies, and create customized communications targeted to their clients and prospects.

Our services address your specific needs and include:

- Naming and identity development
- Branding and graphic design
- Concept development and writing services
- Web design and development
- Video and streaming production
- Public relations programs
- Marketing collateral and print production
- Social media marketing



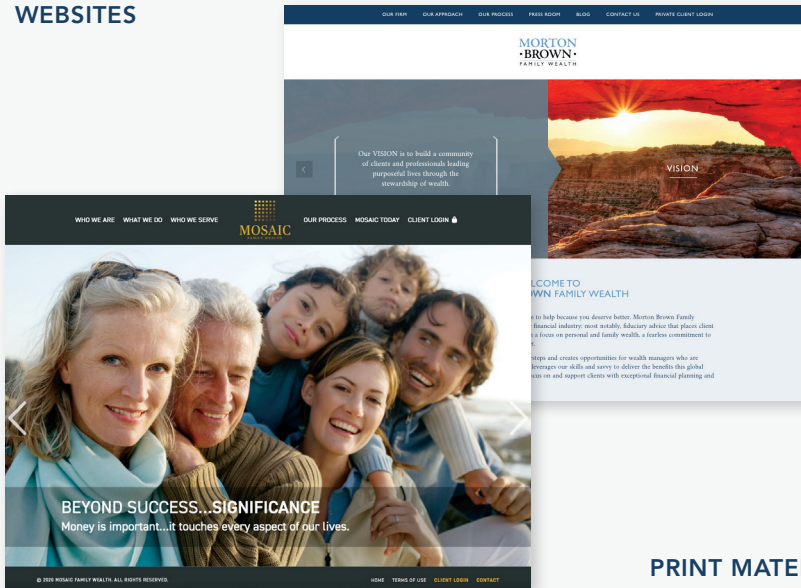
*Trifold client brochure for
Arbor Trust Wealth Management*

Experience Counts

Westcott Associates has helped launch, brand or rebrand more than 50 top wealth management firms nationwide. Our combination of award-winning design, writing, media and production services can assist you in establishing your brand with impact.

We've worked closely with strategic partners such as The RIA Works to develop a tactical marketing roadmap for select advisor teams seeking to become independent, or to transition their business to gain more control of their firm.

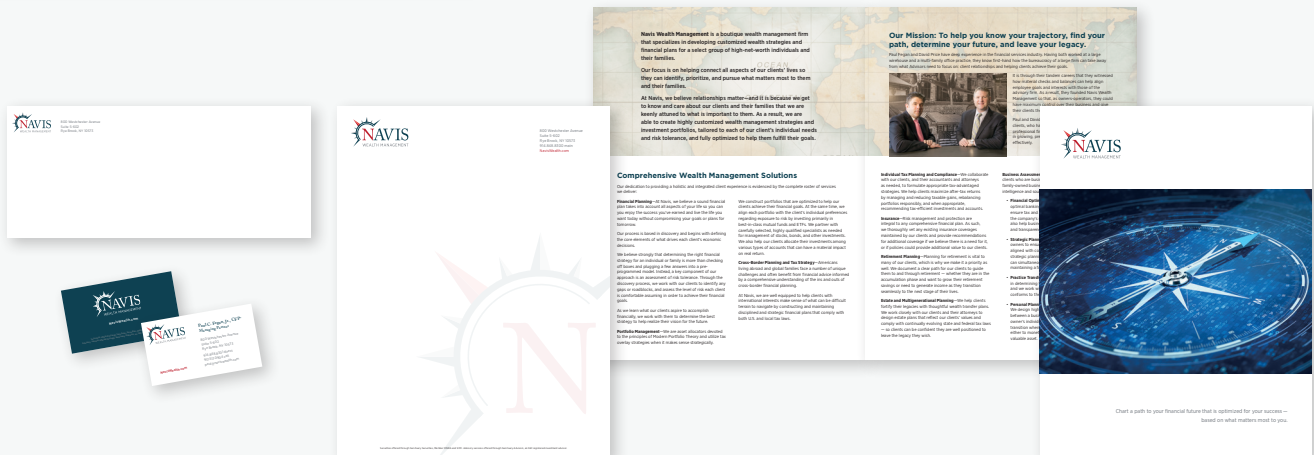
WEBSITES



LOGOS



PRINT MATERIALS



Ready to Step Up?

Learn more about how Westcott Associates can help your firm optimize its brand and marketing efforts by contacting David Westcott at 914.672.0892 or david@westcottamm.com.



WWW.WESTCOTTAMM.COM