



# Assembly Wealth Rebrand & Sales Funnel

Marketing Campaign Kit



## Cement Your Brand in Your Audience's Mind

This campaign kit contains the components of your sales funnel. Most importantly, links to your brand messaging framework.

### Keep in mind:

- Your company must repeat its message to become known and heard.
- People recognize and remember your brand because they've heard your message multiple times.
- This document contains the message for your team to repeat.
- The [elevator pitch](#) and sales scripts addresses your customer's problems.



## Your Mission

Use the language in your messaging framework.

**Step 1:** Leadership and team should memorize and repeatedly share the message for prospects to understand and remember your services.

**Step 2:** Use the language in the script in your sales and marketing.

**Step 3:** Keep repeating the message, even if you're tired of hearing it.

**Without developing a well-crafted elevator pitch or tagline that's consistently repeated, customers won't remember what you offer.**



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# Assembly Wealth Sales Funnel Campaign Kit

The sales funnel creation process has been completed. The elements of the sales funnel include:

1. Determined sales funnel campaign goals.
2. Audience's problems have been identified during the message workshop in order to create the framework.
3. A brand script has been written to clarify the message to use with prospective clients.
4. A sales funnel website page (home page) that follows a proven storytelling framework.
5. PDF/ eBook for lead-generation.
6. eBook email series to nurture and sell.
7. Blogs to educate and grow website traffic.
8. Announcement and follow-up emails to build trust.
9. Social media posts to promote and share.
10. **NOW it's time to announce Assembly Wealth!**



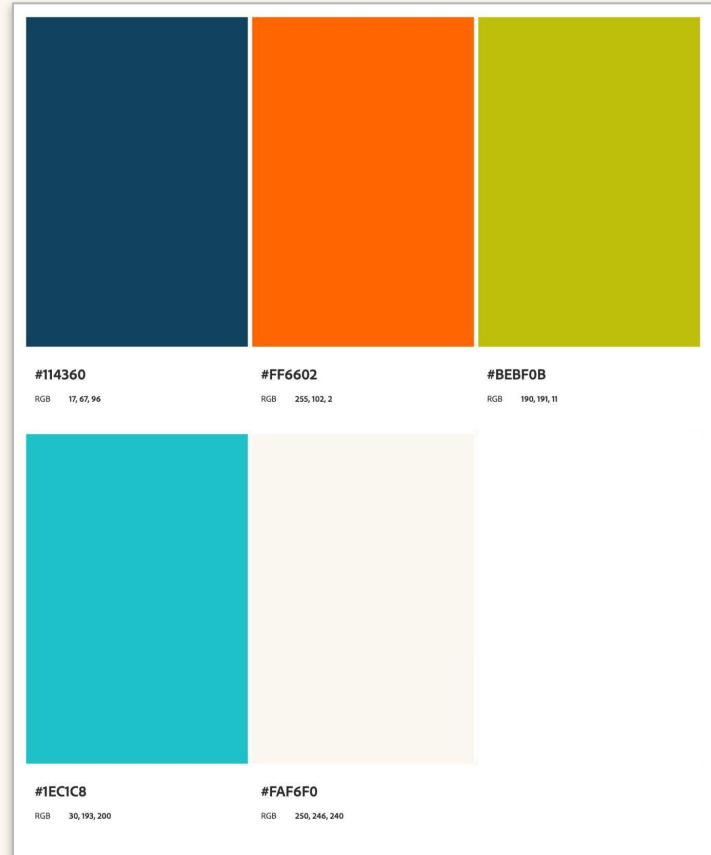
# Colors

- Navy
- Orange
- Lime Green
- Aqua

Off-White

White is used as an accent and  
off-white is the background

Navy blue is used instead of black



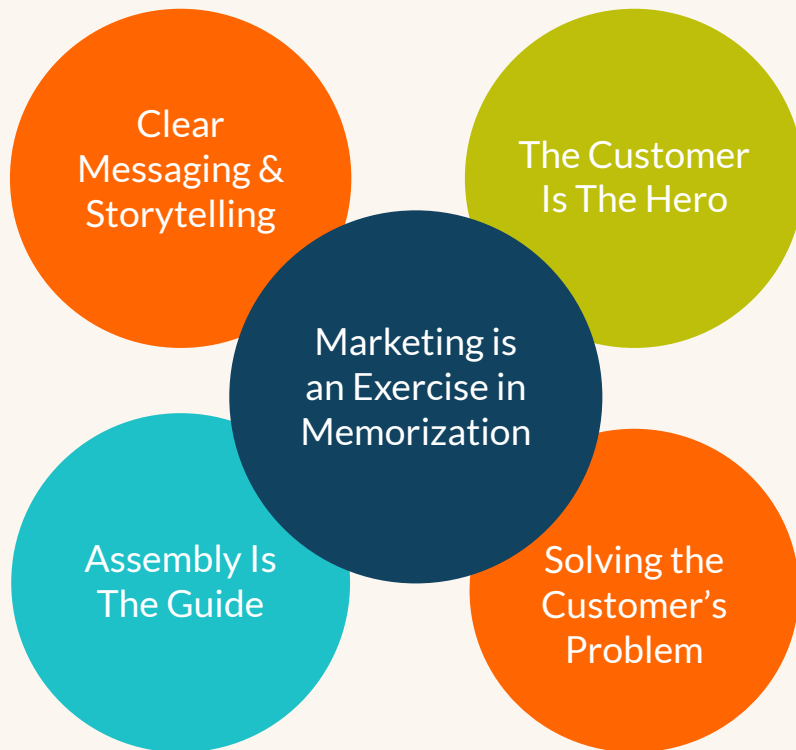
# Messaging Framework

To understand the problems your brand is solving, we kicked-off our project with a 2-hour Messaging Workshop.

From there, we created the BrandScript. You'll use this script every time you talk about your company.

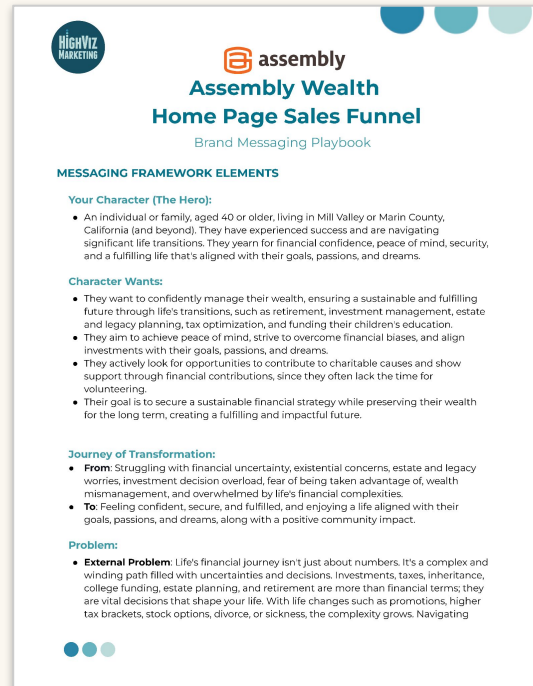
Read. Learn. Memorize. Repeat.

[Brand Messaging Playbook PDF](#)



## One Liner

Navigating life's financial twists and turns doesn't have to be daunting. At Assembly Wealth, we provide premium financial services, rooted in genuine care and understanding, for Mill Valley, Marin County communities, and beyond. Our team is dedicated to creating personalized wealth management strategies that align with your goals, passions, and dreams, ensuring financial security and peace of mind at every stage of life.



The image shows a document titled "assembly Assembly Wealth Home Page Sales Funnel Brand Messaging Playbook". It includes a "HighViz MARKETING" logo in the top left corner. The main content is organized into several sections: "MESSAGING FRAMEWORK ELEMENTS", "Your Character (The Hero)", "Character Wants", "Journey of Transformation", and "Problem". Each section contains specific messaging points for the brand.

**HighViz MARKETING**

**assembly**  
**Assembly Wealth**  
**Home Page Sales Funnel**  
Brand Messaging Playbook

**MESSAGING FRAMEWORK ELEMENTS**

**Your Character (The Hero):**

- An individual or family, aged 40 or older, living in Mill Valley or Marin County, California (and beyond). They have experienced success and are navigating significant life transitions. They yearn for financial confidence, peace of mind, security, and a fulfilling life that's aligned with their goals, passions, and dreams.

**Character Wants:**

- They want to confidently manage their wealth, ensuring a sustainable and fulfilling future through life's transitions, such as retirement, investment management, estate and legacy planning, tax optimization, and funding their children's education.
- They aim to achieve peace of mind, strive to overcome financial biases, and align investments with their goals, passions, and dreams.
- They actively look for opportunities to contribute to charitable causes and show support through financial contributions, since they often lack the time for volunteering.
- Their goal is to secure a sustainable financial strategy while preserving their wealth for the long term, creating a fulfilling and impactful future.

**Journey of Transformation:**

- **From:** Struggling with financial uncertainty, existential concerns, estate and legacy worries, investment decision overload, fear of being taken advantage of, wealth mismanagement, and overwhelmed by life's financial complexities.
- **To:** Feeling confident, secure, and fulfilled, and enjoying a life aligned with their goals, passions, and dreams, along with a positive community impact.

**Problem:**

- **External Problem:** Life's financial journey isn't just about numbers. It's a complex and winding path filled with uncertainties and decisions. Investments, taxes, inheritance, college funding, estate planning, and retirement are more than financial terms; they are vital decisions that shape your life. With life changes such as promotions, higher tax brackets, stock options, divorce, or sickness, the complexity grows. Navigating



## Elevator Pitches

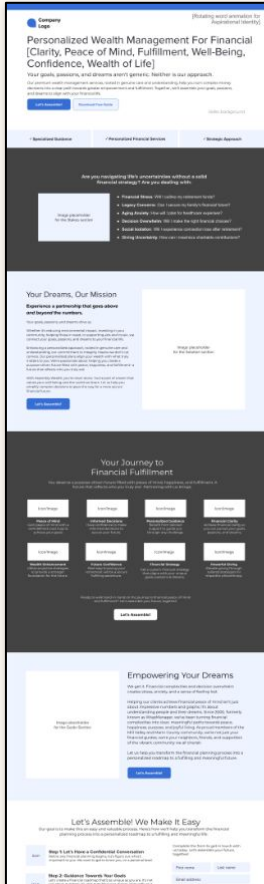
Worrying about life's financial twists and turns, planning for the future, and making investment decisions is overwhelming. But, you don't have to tackle the complex world of finances alone. Assembly Wealth is your trusted guide, ensuring you can live life fully and be rest-assured in your financial journey. We believe wealth management isn't just about numbers; it's about securing your family's future, fulfilling your dreams, and enjoying peace of mind.

You shouldn't have to navigate financial complexities alone. You deserve a partner who sees beyond the numbers and supports your dreams so you can turn confusing financial planning into an inspiring adventure. Assembly Wealth not only understands the finances but also the unique path and deeper meaning behind them. We'll help you transform the financial planning process into a personalized roadmap to a fulfilling and meaningful life.



# Wireframe

## Website Page Wireframe Draft\_PDF



← Header/CTA

← Value Statements

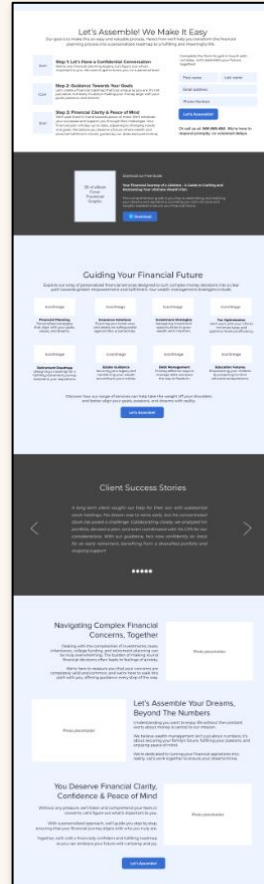
← Stakes

← Solution

← Product Solutions

← CTA

← Brandscript & Value Statements



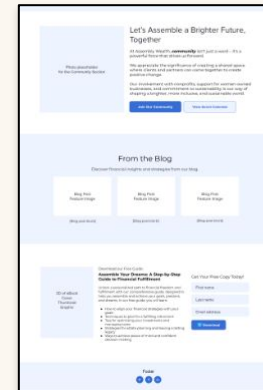
← The Plan

← Lead Gen

← Benefits of Working With Us

← Testimonial

← Overcoming Objections



← Our Community

← Blog Posts

← Lead Gen

# Website

www.letsassemble.com

assembly About Us Our Team Community Events Blog Contact Us CLIENT SERVICE CENTER

## Personalized Wealth Management for Financial Clarity

Your goals, passions, and dreams aren't generic. Neither is our approach.

Our premium wealth management services help you align your financial life with what truly matters to you.

LET'S ASSEMBLE! DOWNLOAD OUR FREE GUIDE

### Download our Free Guide: Your Financial Journey of a Lifetime: A Guide to Crafting and Maintaining Your Ultimate Wealth Plan

This comprehensive guide is your key to assembling and realizing your dreams and aspirations, providing you with the tools and insights needed to secure your financial future.

DOWNLOAD NOW!

## Guiding Your Financial Future

Explore our array of personalized financial services designed to turn complex money decisions into a clear path towards greater empowerment and fulfillment. Our wealth management strategies include:

- Financial Planning**  
Personalized strategies that align with your goals, values, and dreams.
- Insurance Solutions**  
Ensuring your loved ones and assets are safeguarded against life's uncertainties.
- Investment Strategies**  
Investing investment opportunities to grow wealth with intention.
- Tax Optimization**  
We'll work with your CPA to minimize taxes and optimize financial efficiency.
- Retirement Roadmap**  
Designing a roadmap for a fulfilling retirement journey tailored to your aspirations.
- Estate Guidance**  
Securing your legacy and transferring your wealth according to your wishes.
- Debt Management**  
Finding effective ways to manage debt and pave the way to freedom.
- Education Futures**  
Empowering your children by preparing for their educational aspirations.

Discover how our range of services can help take the weight off your shoulders and better align your goals, passions, and dreams with reality.

LET'S ASSEMBLE!

## Navigate Complex Financial Concerns

Dealing with the complexities of investments, taxes, inheritance, college funding, and retirement planning can be truly overwhelming.

We're here to reassure you that your concerns are completely valid and common, and we're here to walk this path with you, offering guidance every step of the way.

## Wealth, Beyond The Numbers

Wealth management isn't just about numbers; it's about securing your family's future, fulfilling your passions, and enjoying financial peace of mind.

We're dedicated to tuning your goals, passions, and

## Achieve Financial Peace of Mind

Without any pressure, we'll listen and comprehend your fears or concerns. Let's figure out what's important to you. With a personalized approach, we'll guide you step by step, ensuring that your financial journey aligns with who you truly are.

LET'S ASSEMBLE!

## From the Blog

Unlock a wealth of financial knowledge.

- Retirement Planning: Different Strategies for Different Goals**  
Jan 29, 2024 by Sarah Thompson  
When we talk with clients about saving and investing for the future, the conversation usually starts toward retirement planning – 401k...
- How to Maximize Your Charitable Giving**  
Jan 29, 2024 by Sarah Thompson  
Charitable donations are an effective way to reduce your taxable income while also giving back to your community. According to a recent...
- Are You Prepared for These Financial Challenges?**  
Jan 6, 2024 by Gabriel Surovich  
Financial challenges come in different shapes and sizes. Some build up over time, others are completely unexpected.

Let's assemble is a lot of things.

Personalized Wealth Management for Financial Clarity

Retirement Planning: Different Strategies for Different Goals

How to Maximize Your Charitable Giving

Are You Prepared for These Financial Challenges?

LET'S ASSEMBLE!

# eBook

## Your Financial Journey of a Lifetime

A Guide to Crafting and Maintaining Your Ultimate Wealth of Life Plan

[Landing Page](#)

[Thank You Page](#)

View the eBook [here](#)



# Email Series

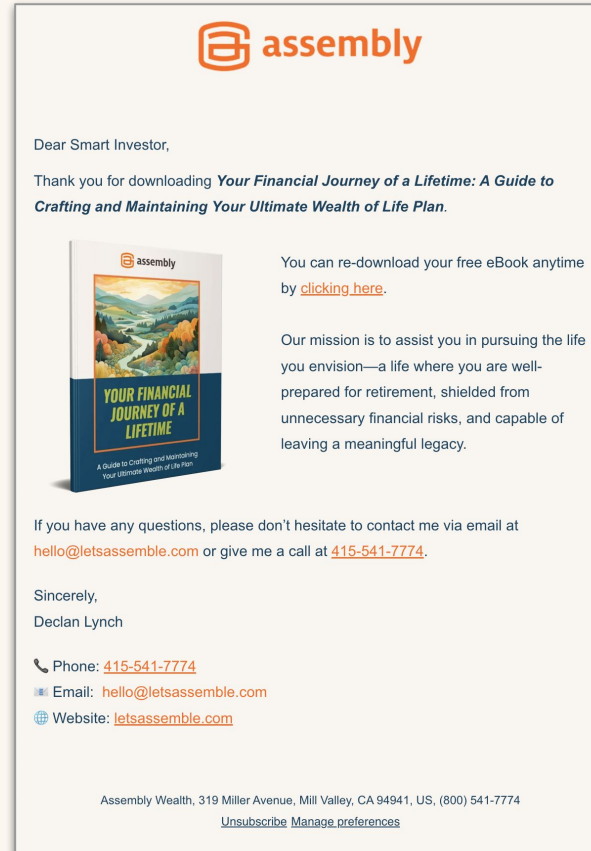
[#1: Download eBook](#)

[#2: Problem + Solution](#)


[#3: Overcome Objections](#)

[#4: Testimonial](#)

[#5: Sales Letter](#)

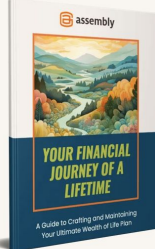


The screenshot shows an email from Assembly. At the top is the Assembly logo. The body of the email starts with "Dear Smart Investor," followed by a thank you for downloading the eBook "Your Financial Journey of a Lifetime: A Guide to Crafting and Maintaining Your Ultimate Wealth of Life Plan." To the left of the text is a 3D rendering of the eBook cover, which features a scenic landscape and the title. To the right of the cover, the email text continues: "You can re-download your free eBook anytime by [clicking here](#)." Below this, it states the company's mission: "Our mission is to assist you in pursuing the life you envision—a life where you are well-prepared for retirement, shielded from unnecessary financial risks, and capable of leaving a meaningful legacy." At the bottom, it provides contact information: "If you have any questions, please don't hesitate to contact me via email at [hello@etsassemble.com](mailto:hello@etsassemble.com) or give me a call at [415-541-7774](tel:415-541-7774)." This is followed by a sign-off: "Sincerely, Declan Lynch". Below the sign-off are icons and links for phone, email, and website. At the very bottom of the email, it lists the company address and links for "Unsubscribe" and "Manage preferences".

 assembly

Dear Smart Investor,

Thank you for downloading **Your Financial Journey of a Lifetime: A Guide to Crafting and Maintaining Your Ultimate Wealth of Life Plan**.



You can re-download your free eBook anytime by [clicking here](#).

Our mission is to assist you in pursuing the life you envision—a life where you are well-prepared for retirement, shielded from unnecessary financial risks, and capable of leaving a meaningful legacy.

If you have any questions, please don't hesitate to contact me via email at [hello@etsassemble.com](mailto:hello@etsassemble.com) or give me a call at [415-541-7774](tel:415-541-7774).

Sincerely,  
Declan Lynch

📞 Phone: [415-541-7774](tel:415-541-7774)  
✉ Email: [hello@etsassemble.com](mailto:hello@etsassemble.com)  
🌐 Website: [etsassemble.com](https://etsassemble.com)

Assembly Wealth, 319 Miller Avenue, Mill Valley, CA 94941, US, (800) 541-7774  
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# CTAs & Feature Images

**FREE GUIDE**  
**CRAFT AND MAINTAIN YOUR ULTIMATE WEALTH OF LIFE PLAN**

Get the tools and insights needed to secure your financial future.



- ✓ Gain Clarity
- ✓ Overcome Challenges
- ✓ Safeguard Assets
- ✓ Fund Your Dreams

**DOWNLOAD NOW**



## ABOUT US

We are here to help you transform financial challenges into opportunities.



## PERSONALIZED WEALTH MANAGEMENT FOR FINANCIAL PEACE OF MIND

- ✓ Specialized Guidance
- ✓ Personalized Financial Services
- ✓ Strategic Approach

**FREE DOWNLOAD**  
**READY TO TAKE CONTROL OF YOUR FINANCIAL FUTURE?**

Start crafting your Wealth of Life plan today.



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