

WHERE FINANCIAL SERVICES AND COMPELLING COMMUNICATIONS CONVERGE

Messaging. Connection. Engagement. Sales.



A Marketing and Consulting Agency Dedicated to the Financial Services Industry



TABLE OF CONTENTS

3	Who We Are
5	How We Empower Your Brand
6	Areas of Expertise
8	Sales and Pipeline Enablement
11	Consulting and Pricing Models
12	Testimonials
15	About the Owner
15	Engage with Us

WHO WE ARE

Our clients want more. More influence. More business growth. More authentic connections with potential buyers.

We enable you to touch more hearts and minds with memorable messaging, captivating content, and creative marketing.

Financial services organizations, non-profit firms, financial advisory groups, wealth management practices, third party administrators, software as a service (SaaS) firms, and entrepreneurs rely on *JustPositionIt!*® Consulting to solve their marketing and communication challenges.

JustPositionIt! manages strategy development, custom content, design, and social solutions that help solidify relationships and secure sales.

Our team of expert writers, project managers, editors, videographers, graphic designers, and ad gurus can bring any initiative to life. We are the extension of your marketing team(s) and work to uncover your mission, identify your business goals, and execute for success.

We're delivering ideas to more than 50,000 businesses on attracting customers, retaining clients, lead generation, copywriting, website best practices, and messaging.

**Named a Top 50 Digital Marketing
Twitter Account to Follow for Specialty
in Conversion Copywriting**

TheOnlineAdvertisingGuide.com

2022



47%

of buyers view three to five pieces of content before engaging with a sales representative.



HOW WE EMPOWER YOUR BRAND

Words matter.

Our forte is retirement communications and helping you amplify your message with clients, prospects, and stakeholders.

The business consumer is more educated than ever before and will research you and your company before entering into a financial transaction. This allows you the opportunity to provide massive value first, before expressing why they should care about you and your services.

Content is the magnet that attracts the masses, tells emotional stories, and fortifies connection to your business.

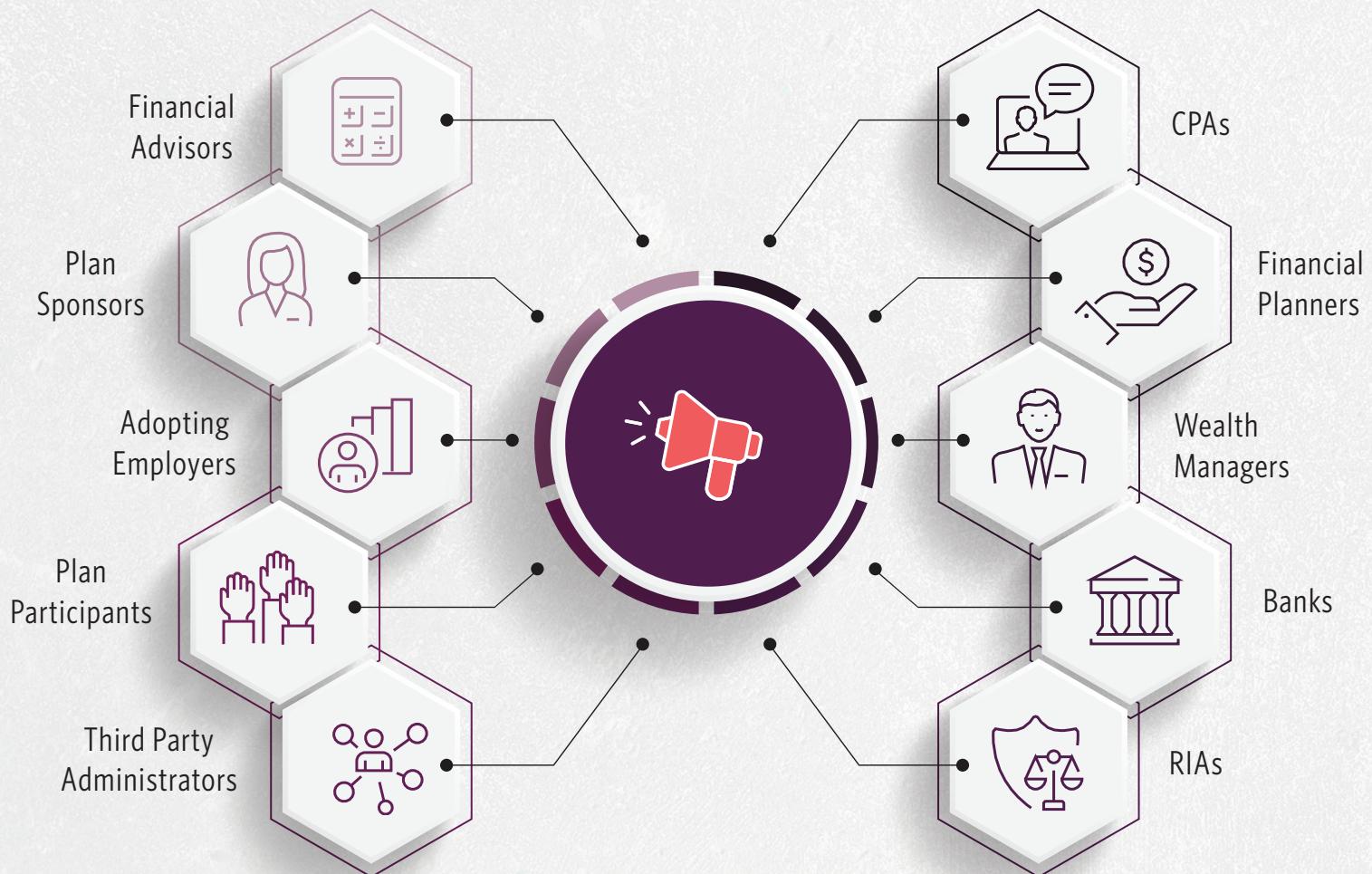
WHAT WE WRITE

DIGITAL ASSETS	BRAND ASSETS	CORPORATE ASSETS
Email sequences (nurture and evergreen)	Branded processes and signature systems	Proposals
Websites	Mission statements and slogans	Presentations and Investor Pitch Decks
Sales and landing pages	Product and brand names	Public relations, crisis, and client communications
Facebook and Instagram ads	Product descriptions	White papers
Video scripts	Webinar scripts	Brochures
Social media profiles and content	Course and program names	Biographies
List-building content	Phone and on-hold scripts	Blog articles

AREAS OF EXPERTISE

Your brand will need to speak to multiple audiences across a range of topics and conversations. Our knowledge set includes a deep understanding of the voice of your customer. We help you engage using language that resonates with your customer's unique needs and goals.

WHO WE SPEAK TO BY AUDIENCE



Not an exhaustive audience list.



WHAT WE SPEAK TO BY PRODUCT AND TOPIC

PRODUCTS

401(k) Plans	Not-for-Profit 403(b) Plans	Cash Balance Plans
Government 457 Plans	Multiple Employer Plans (MEPs) Pooled Employer Plans (PEPs)	Taft-Hartley (Union Plans)
Prevailing Wage (Davis Bacon)	Payroll	Life Insurance

TOPICS

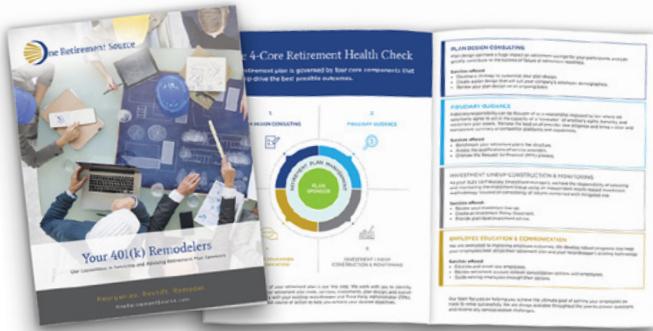
Safe Harbor	Financial Wellness and Education	Fiduciary Management	3(16) Services
3(38) Services	Compliance	SECURE Act	Medicare
Estate Planning	Social Security	Economy	Stock Market

SALES AND PIPELINE ENABLMENT

Get noticed with professionally written, custom content and communications. Look to us for design, content development, printing and fulfillment, consulting, and full project management.

► Plan Sponsor Sales Materials

Proudly present your brand that attracts your ideal clients. Whether you need capabilities brochures, sell sheets, or compliance calendars, you need tools that help close sales.



► Participant Education

Employees are more likely to participate in a company plan when they have a clear understanding of their retirement goals and have access to tools that help them along their journey.



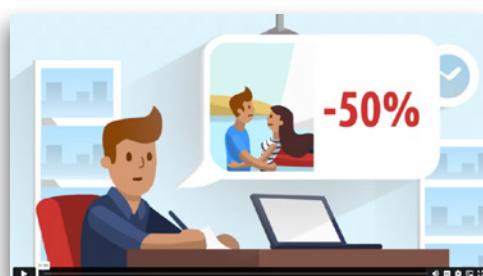
► Financial Updates and Market News

Create *Wall Street Journal*-worthy market analysis providing timely insights that demonstrate your thought leadership.



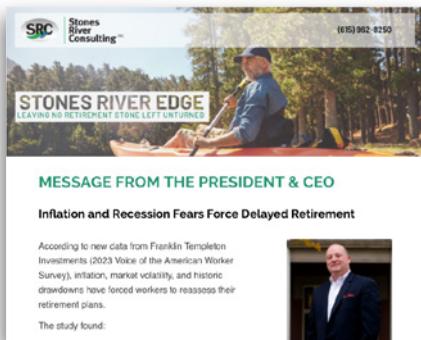
► Video Marketing

Short- and long-form videos are a powerful medium to deliver a message, showcase expertise, and inspire action. Whether animation or whiteboard, our teams can support your vision complete with script writing, production, and delivery.



► Email Marketing

Email marketing supports both new business and retention efforts. Our teams can design, write, deploy, and manage your campaigns and newsletters.



► Social Media Campaigns

Social media is exceptional for brand awareness, and it also influences your marketing and sales funnels, helps build authority and reputation, informs product development, provides customer service, and more.



► Advertising and Public Relations

Design your next trade publication advertisement and get support with your public relations needs through bylined articles and press releases.



► Presentations

Develop visually arresting, branded, and topic-specific PowerPoint presentations. Finals presentations and investor pitch decks are also offered.



► Event Marketing

Be the showstopper at your next industry event and optimize your traffic and lead generation. Our teams can design your booth, brainstorm giveaways and booth attractions, and procure tchotchkies.



► Proposals and Onboarding Materials

Seamlessly onboard retirement plan clients and help them understand roles and responsibilities, timelines, and the conversion process.





ONLINE PRESENCE

What does your website say about your business? Your website is the nerve center of your brand and can create immediate differentiation from your competition.

94% of buyers research companies online before making a purchase decision.

84.3% of those buyers check a company's business website.

WEBSITE SERVICES INCLUDE:

- Discovery and Project Scope
- Strategy
- Concepting, Wireframing, and Navigation
- Writing
- Production
- Testing
- Delivery
- Launch Planning

CONSULTING AND PRICING MODELS

MARKETING STRATEGY AND PLANNING

Consulting and marketing planning services are also available.

Offerings include:

- Annual, quarterly, or monthly marketing plan development
- Product launch and go-to-market strategy
- Market research and ideal customer exploration
- Campaign development

SERVICE PACKAGES



Hourly or Flat Fee



Fixed Fee



Monthly Retainer

Ideal for:

- Smaller, on-demand needs
- Short-term projects
- One-off marketing requirements

Ideal for:

- Projects requiring multiple assets and deliverables
- Larger, fixed-scope engagements
- Product or content suites

Ideal for:

- Ongoing monthly marketing needs
- High-level strategy
- Full-scope project management
- Support needing 24/7 team access
- Consistent oversight
- Predictable budget spend

TESTIMONIALS

"It's rare to have a friend who is not only talented but also an exceptional marketer like Angela Murphy. Her deep understanding of the retirement plan industry and her creativity in developing compelling content are just two of the many skills that make her stand out.

In a world of noise and nonsense, Angela and JustPositionIt! bring exceptional capability and unwavering commitment to delivering results. She is always one of my go-to referrals for financial professionals looking for marketing help!"

Sheri Fitts,
Owner, Sheri Fitts & Co.

"Angela is a uniquely talented marketing professional. I have always been impressed by her desire to listen to her customer and consistently deliver results beyond expectations. I am proud to have worked with Angela on so many initiatives and consider her contribution and the example she sets, a critical component to success."

Kelly Michel

MBA, AIF, Principal at KME Retirement Consulting
Former Senior V.P of Institutional Sales and Business Development, Transamerica

TESTIMONIALS

"Angela understands that words can be powerful! She helps you use the right words to evoke emotion, tell an enticing story, and sell."

Alba Adrian

Marketing Director at the University of Southern California (USC)
Marshall School of Business

"Angela truly has the perfect name, because she really is an 'Angel' who not only provided me with her phenomenal copywriting (that really feels connected with me and my voice); she also brought her super smart and strategic ideas on positioning my message to every asset of my funnel – from the landing page – to the webinar scripting – to the slides – to the emails – to the sales and checkout pages. I can't recommend her highly enough!"

Charis Santillie

Life Balance Coach at Charis Your Life



ABOUT THE OWNER

Angela Murphy is the by-product of two entrepreneur parents, has an innate passion for developing creative strategies that get people to act, and understands the superpower of marketing and its impact on the bottom line. Following in her parents' footsteps, she founded the boutique marketing agency, *JustPositionIt!* Consulting in 2018.

Prior to her entrepreneurial endeavor, Angela joined Transamerica's Channel Marketing group in 2007 focusing on Multiple Employer Plan (MEP) initiatives. Angela's responsibilities quickly expanded, and she began managing bank channel, Davis Bacon, Paychex, defined benefit/cash balance, SPGA, broker-dealer, Third Party Administrator (TPA), and Taft-Hartley marketing strategy.

She also managed the TPA Channel's Rewards Program and acted as a marketing consultant to 50+ members. Promoted to Director, she managed strategy and written communications for TPA, Plan Sponsor, Financial Advisor, and Payroll Channels.

A graduate of USC's Marshall School of Business, Angela was named a Top 50 Digital Marketing Twitter Account to Follow by TheOnlineAdvertisingGuide.com, for a specialty in conversion copywriting.

ENGAGE WITH US

Your business deserves the best possible opportunity for success, now and in the future.

Imagine . . . attracting clients who genuinely value what you do.

Imagine . . . standing out from the crowd in a sea of sameness and not feeling like you can only compete on price.

Imagine . . . how great you're going to feel with a concrete vision, clear goals, and a roadmap to grow.

We'd love the chance to collaborate with you.

JustPositionIt.com



Angela Murphy

Founder & Agency Owner

Contact

310-490-4722

angela@justpositionit.com



The ideas, content, and principles in this brochure are provided on an advisory basis only. Results of application are entirely dependent on the abilities of individual companies or individuals.

No guarantee is made regarding earnings, financial, or any other outcomes. Any and all forward-looking statements are intended to express an opinion only of any earnings potential. Many factors will be important in determining your actual result and no guarantees are made that you will achieve any results from the ideas and techniques in this material.

The author assumes no responsibility or liability whatsoever on behalf of the reader of these materials. JustPositionIt!® Consulting offers no representation, warranties, or guarantees verbally, in writing, or otherwise regarding specific earnings or results. Results for each person may vary significantly. The advice and copywriting strategies provided may not be suitable for your situation. JustPositionIt!® Consulting shall not be held liable for any loss of profit, revenue, or any commercial damages, including but not limited to special, incidental, consequential, or other damages as a result of this publication. JustPositionIt!® Consulting does not provide legal advice. Please consult with your own or your company's marketing, legal, or compliance department(s) before using any materials, copy, suggestions, or marketing ideas provided. The ideas provided are meant to help you think differently about yourself, your product, service, marketing, or brand. If you'd like a full consultation for your particular purpose, please request one.