

**PLOTT**

FINANCE & PROFESSIONAL SERVICES

**At PLOTT we love working with progressive financial and professional services firms.** Whether it's a style refresh to reflect new leadership, a dynamic start-up, or building brand value for exit planning, let us help tell your story and **bring your brand to life.**

Over the next few pages we have chosen some of the brands we're most proud of. So take five, grab a cuppa, and **immerse yourself** in some of our favourite clients stories.



**JARROVIAN**  
GROUP

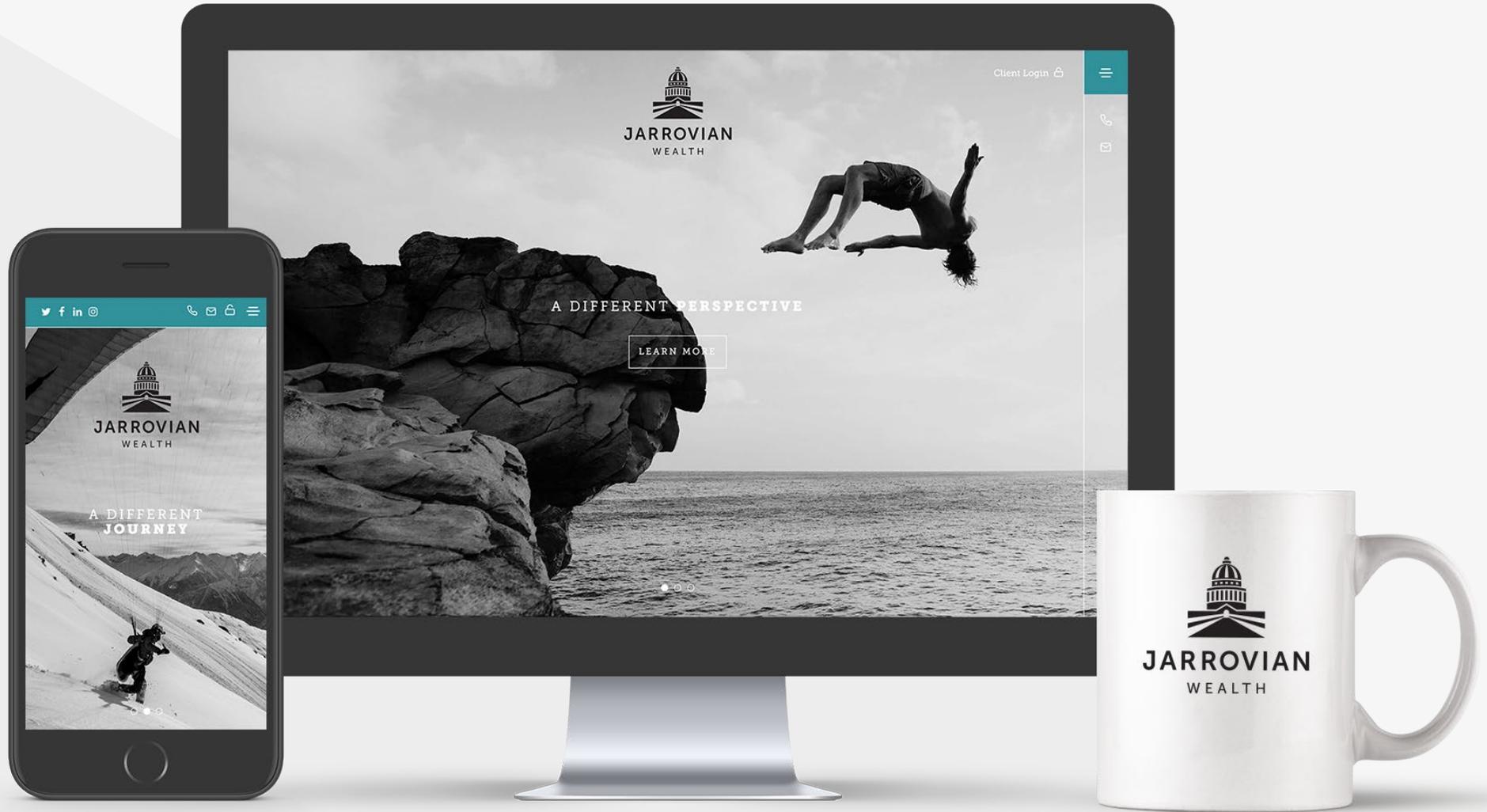
# The challenge.

Jarrovia Wealth is a City based team of Financial Planners.

They approached PLOTT with big growth plans and needed a brand to reflect their high aspirations.

The young team all had established City firm backgrounds and were keen to create a less 'corporate' and more on-trend image. They needed a brand which would appeal to the Shoreditch tech community and their trendy peers.

They wanted an agency who understood the financial services sector yet could disrupt the market with compliant but engaging communications. This was music to our ears!

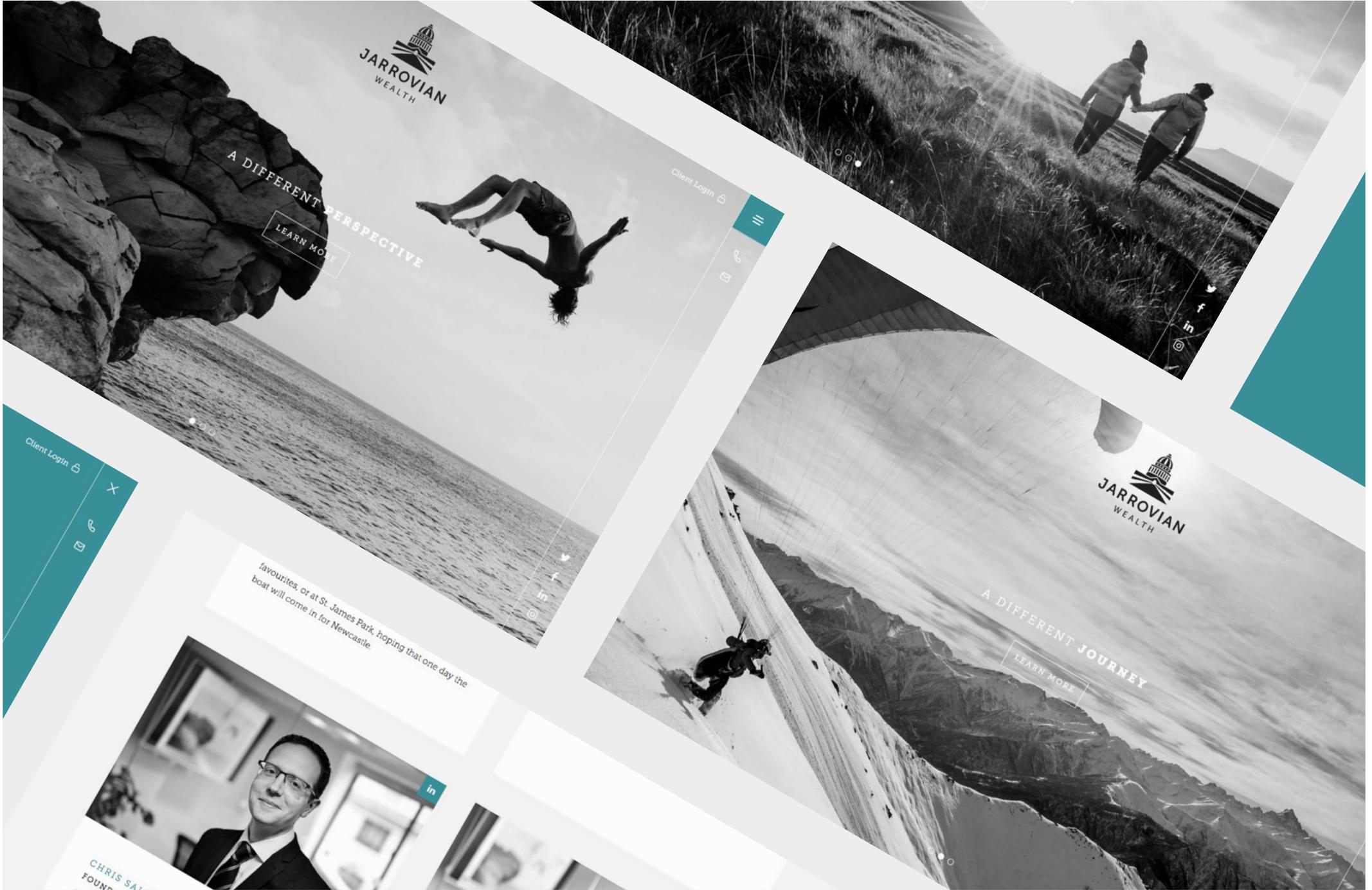


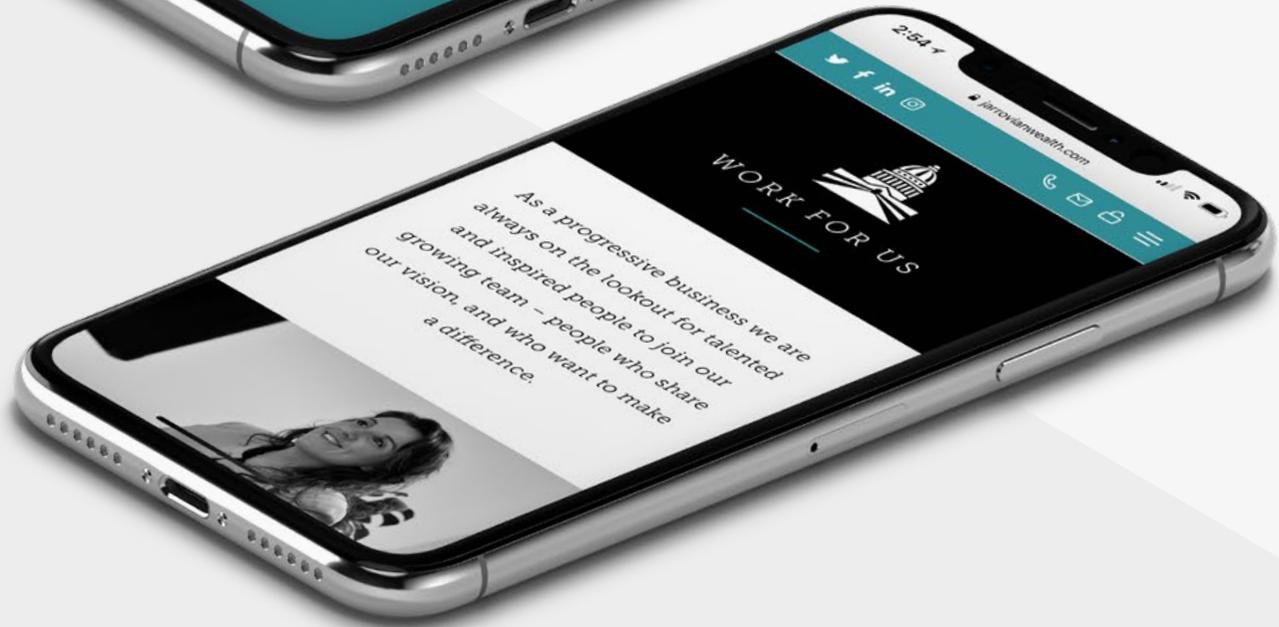
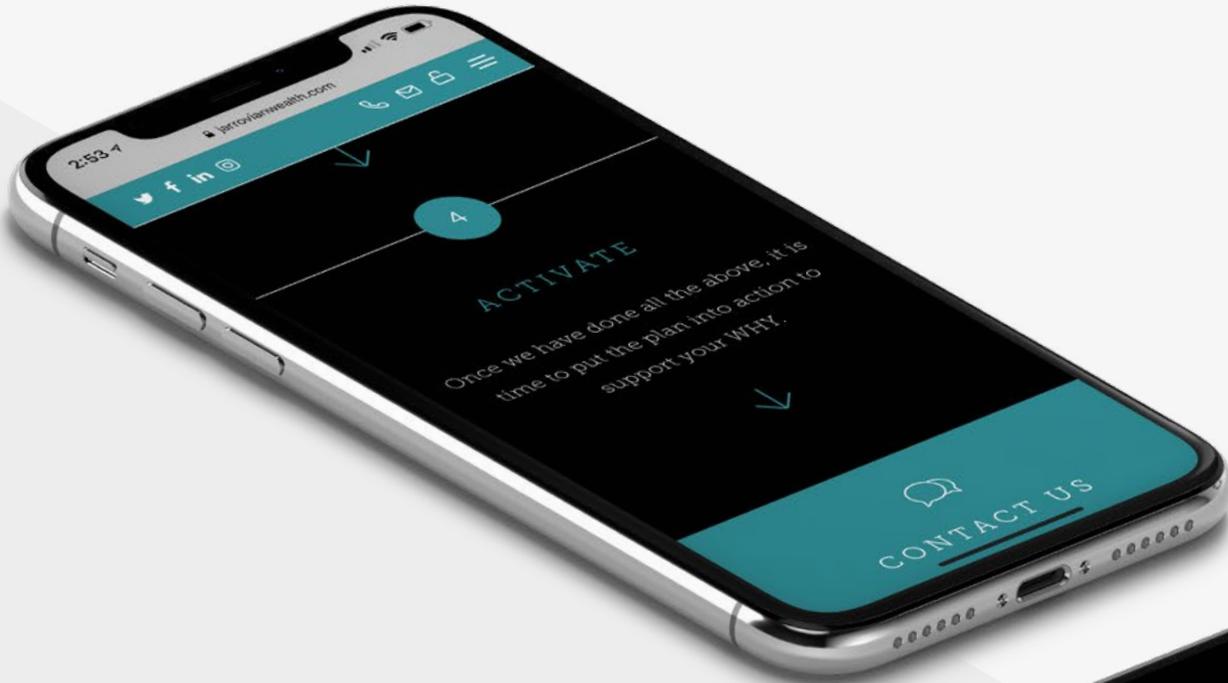


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We wanted a specialist who understood the financial services industry but were also creative thinkers who could help bring our vision to life and tell our story. The team worked hard to understand us and how we wanted the business to look and feel to support our growth plans. PLOTT are easy to work with, approachable and quick to respond.

GRAEME PRICE | CEO





# The solution.

We spent time with the team to get under JW's skin and understand their purpose, values and service proposition.

We crafted an aspirational brand and an inspirational photography suite to support their key messages. The slick brand and imagery engaged the younger, more 'tech' focused audience.

We completely overhauled their brand styling whilst retaining a subtle nod to their previous identity which ensured consistency for their existing clients.

We also modernised the logo, keeping the existing St Paul's Cathedral icon but simplifying it.

We're immensely proud of their new corporate identity and stylish St Paul's iconography. Their website is bold, brave and truly positions them as the next generation of financial planners in a highly competitive landscape.



THE  
INTELLIGENT  
STRATEGIC  
PARTNERSHIP

# The challenge.

The TISP brand needed a major overhaul. It was tired, dated and no longer reflected their culture or service offering.

Their high-net worth client base included celebrities and footballers, so the brand had to reflect their aspirational target market and impressive heritage.

They tasked us to create a memorable, iconic brand with the 'wow' factor which would appeal to and attract a younger, cooler, millennial client base. They wanted stand-out and a way to engage clients who's native language wasn't always English.







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We pride ourselves on being different – and the PLOTT team really got under our skin and found our DNA. They added the creativity and thinking we needed to help our brand grow up in line with our business aspirations. We love our new brand and we love the support we have from the team.

AJAY MAHAN | MANAGING DIRECTOR







# The solution.

We worked with the team to understand their client base and driving factors. They likened client's finances to the game of 'Kerplunk' so we jumped on this analogy!

Their new logo design had a fresh colour palette and used a modern shield to reflect their heritage. We used the latest photo and video technology, including a drone to capture their prestigious offices.

We scripted and storyboarded an animated infographic video around the 'Kerplunk' theme which brought their core messages brand to life in way that resonated and engaged potential clients. We also created a suite of supporting animations for their target markets plus their Tax and Employee Benefits products.

The new brand was launched at a prestigious champagne reception and the business is going from strength to strength.



A young child with short blonde hair, wearing a red, white, and blue plaid shirt and yellow shorts, is sitting on the shoulders of an adult. The adult is wearing a red and white plaid shirt. They are both looking out over a vast, open landscape under a warm, golden sunset sky. The child's hands are resting on the adult's shoulders. The overall mood is peaceful and contemplative.

 Ascot Lloyd

# The challenge.

When BellPenny and Ascot Lloyd merged PLOTT were tasked with working with both teams to align the brands and refresh the overall look and feel and brand toolkit.

The new leadership team were keen to create an approachable brand identity with a refined corporate image.

Once the brand had been established we then needed to get it rolled out across multiple marketing channels.

The client couldn't stop business and wait for the literature to be ready so a tight schedule was created to manage the rebrand quickly and efficiently in time for the merger announcement.



**Ascot Lloyd**

Personal financial planning for life's journey

**With you every step of the way**

Our goal is to put in place the foundations to build strong financial futures to empower you to achieve your financial goals.

Your financial plan is like your travel itinerary. It factors in where you want to go, your available funds, your work, your budget, the time it takes to get to each of your destinations, the best way to get to each of your destinations and together we'll ensure your journey is a regular basis in your own words. We'll share the itinerary or map as you progress along the way, so you can see you're on the right track. We'll also make sure you're not missing any of the stops along the way, so you can enjoy the journey and ensuring you make the most of your money.

**The five steps**

- Getting to know you**  
This is the opportunity to get to know each other to your better understand your current position and financial objectives. We will explore your assets to establish your financial picture and needs.
- Agreeing our relationship**  
We provide a range of different service levels to suit your needs from a 'retainer' service to a 'flexible' service that enables you to engage our services as and when you need to.
- Behind the scenes**  
There is a lot to do to put the plan into action. We will ensure you understand the implications of the plan and how we will manage the plan on your behalf.
- Putting it in to practice**  
Your adviser will meet with you to discuss the plan and ensure you understand the implications of the plan and how we will manage the plan on your behalf.
- Staying on top**  
There are many ways to ensure you stay on top of your financial picture. We will ensure you understand the implications of the plan and how we will manage the plan on your behalf.

**Our Solutions**

- Business Protection**  
We ensure your business is properly protected to ensure continuity should you encounter unforeseen circumstances.
- Investment Advice**  
We advise on the best investment strategies for your business to ensure your profits are working hard.
- Group Life and Healthcare**  
We help you to choose a range of policies that your employees will value and ensure you get the right cover on the best possible terms.
- Personal Financial Planning**  
We provide personal financial planning and advice for business owners and their families to ensure they are on the right track.
- Employee Benefit Programs**  
We design, implement and administer employee benefit programs that reward your employees and reflect the needs of your business.
- Workplace Pension**  
We advise on workplace pension and a full range of workplace pension schemes to ensure your business complies with auto-enrolment and meets the needs of your employees.

**Working with you**

Our job is to make sure the right assets are in the right hands at the right time. We do this by regularly monitoring your financial plan to ensure it continually reflects your short, medium and long-term goals.

**The Ascot Lloyd difference**

We believe we have a refreshingly different approach to working with our clients. Whilst we have a strong technical pedigree to manage even the most complex financial situations, we're pragmatic and practical in the solutions. We strive for excellence in everything we do and believe this is something that makes us truly special.

**Planning**  
We believe it's important to consider the bigger picture when providing financial advice. That's why we focus on creating financial plans that enable companies and individuals to meet their long-term financial goals. This means you can be confident that we have provided the same level of care and attention to your business and your family as we do to our individual clients.

**Service**  
We believe that to ensure the best results you need a real relationship, not just your financial adviser, but with the whole company.

**Independence**  
Because we are an independent independent, we ensure you are not at the mercy of a large financial institution. This means you can be sure your financial plan isn't being influenced by the needs of a large financial institution.

**Client satisfaction**  
We encourage and welcome feedback from our clients to ensure we continue to deliver the highest levels of customer service. We listen to the needs of our customers and will do anything we can to ensure the highest levels of customer service.

**Financial planning**

Developing a financial plan that protects you now, and in the future means that you for whatever lies ahead. We take time to thoroughly understand your short-term goals and will develop a financial plan to help you to achieve them.

**Getting there is a 2 to 2**

Products like pensions and investments act as your money to prosper in your life. If you don't have the right products in place, you may be missing out on the best possible return for your money. We can help you to ensure you are getting the most out of your money.

**Making the most of your money**

Like any good journey you embark on, you want to ensure you are getting the most out of your money. We can help you to ensure you are getting the most out of your money.

**Ascot Lloyd**  
Call 0120 473 7300  
Web: www.ascotlloyd.co.uk  
Email: corporate@ascotlloyd.co.uk



**Ascot Lloyd**

## What if I want to retire early?

From early retirement to up-sizing your home or mitigating inheritance tax, we can make your financial goals become a reality with expert financial planning.

We can help you achieve your financial goals

Call 0345 475 7500 Visit [www.ascotlloyd.co.uk](http://www.ascotlloyd.co.uk)

Regulated and Authorised by the Financial Conduct Authority

...can take the benefits will apply. This is also dependent upon the jurisdiction of the Qrop, and the jurisdiction where the policyholder is tax

...of pensions, so it appears to contravene EU law." The numbers involved are significant, and could result in billions of pounds being lost to the Treasury if a number of people had decided they wanted to

...EU law, freedom across EU member states, Director of Chase Belgrave, said: "The lesson from this episode should be that the pensions environment in the UK is highly fluid. Just as the removal of the bulk of the Australian Qrops showed, possibilities can and do change.

"Expats should not delay in exploring the options available to them. It is also more important than ever to retain specialist financial advice. It is not enough to assume that a particular course of action may or may not be possible or prudent."

Some people did manage to take advantage of the loophole to move their scheme before it was closed. Once their transfer is complete they will need to consider what to do with their pension next.

James McLeod, head of pensions at AES International, said: "Those people lucky enough to have squeezed through HMRC's ultimate cut off point on September 7 will now have almost complete control over their pensions, for the first time.

"The list of investments permitted under the Rops [the new name for Qrops] legislation is very similar to that offered under the UK's Sipp rules and so is very wide indeed.

"Investors will be able to build an investment portfolio which should allow them to continue to grow their capital, while also taking an income - although this of course depends very much on the size of the pot to begin with. The major

...Harris, managing director of Chase Belgrave, said: "The lesson from this episode should be that the pensions environment in the UK is highly fluid. Just as the removal of the bulk of the Australian Qrops showed, possibilities can and do change.

...In the scenario, potentially, firms or advisers providing a charging fee on a pension may only be w excess of £30,000 already common contractual arrangements in place between financial advisers and Qrop specialists.

"The same kind of firms will simply e their relationships to the other required parties. From the client's perspective, this is unlikely to be favourable. An unwieldy arrangement to be favoured. Anyway, it is always easier to understand where it runs concurrently from one point to another.

"Receiving four or five different but connected documents, and having to pull them all together to understand the overall position, is difficult for anybody to do."

Thanks to the increasingly complicated nature of UK pension transfers overseas, this is certainly not something that you should undertake without first seeking some advice or subject from an

“

The integration of two brands is never easy or straightforward. PLOTT have provided invaluable support throughout the whole progress and when twinned with their knowledge, understanding and creativity were the obvious choice for us. We have now developed a strong brand that we aim to make a market leader within the financial advice market.

EMMA WILDE | MARKETING MANAGER



4 | intouch

## Introducing the New Ascot Lloyd App

In our last issue, we revealed that we would be launching a brand-new Ascot Lloyd app for our clients. After months of research, development and testing, we are excited to announce our app is now ready for you to download. This comprehensive mobile app offers many new features including calculators, tools and guides for users to explore.

### Key Features

Your profile on our app can be set up quickly and easily, after you've registered and one which provides a comprehensive 24/7 comprehensive access

Our goal was to create a mobile-friendly app that our clients can access 24/7 on the go, and one which provides a comprehensive user experience.

### A user friendly experience

You will find each section easy to navigate to via the home screen, and each feature has been carefully created to reflect what we feel our clients would benefit most from.

### Tax calculations made simple

One of the most significant features on the app is the Calculator section which has been divided into England, Wales & NI, and Scotland to ensure your calculations are in line with the tax rules appropriate for your place of residence. There are several calculators to choose from including VAT, Corporation Tax and Income Tax, amongst many others.

### Stay informed

The News section is updated regularly in line with our website to keep you informed of latest news and information, allowing you to read articles on the go.

**Protecting your security is highly important to us, so please remember your login information when you sign up**

- 2) Scan
- 3) Download
- 4) Enter the code / Ascot Lloyd
- 5) Register your details - this can only be requested once upon initial sign up
- 6) Enjoy using the app

### Meet the team

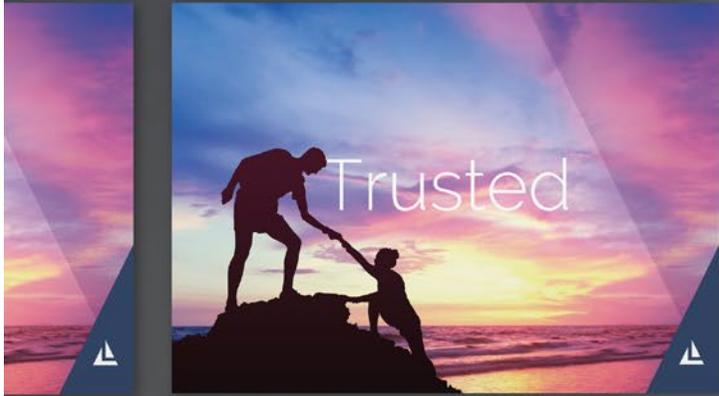
Our clients are at the core of what we do. In order to ensure you are being looked after by the right person our Meet the Team section has been divided according to county, so you can find the adviser closest to your local area. It's easy to contact us directly via the app using the messaging service and our contact details can be found in the 'Meet the Team' section. Touch tab at the bottom of the screen.

### Personal Finance Portal Integration

For clients who use the Personal Finance Portal, you can now directly access your investments through the Ascot Lloyd app, which means you do not need to switch platforms, just select the investment portfolio icon within the app and login with your usual portal details. Clients will need to be registered to the portal in order to access this section.

Please let us know if this is a feature you would like and we can look into access on an individual basis for you.

If you have any queries about the app, or would like to maximise its use, simply contact our Financial Planning team. We will be able to help you.





# The solution.

To seem more approachable, we brightened the colour palette from traditional banking blue and added secondary colours to differentiate product offerings.

We developed a unique imagery style; different to everyone else in the industry which enabled them to instantly grab attention.

Once the brand was launched we rolled it out across all existing marketing collateral, including brochures, application forms, emails, advertising, product flyers, the website... and much more!

They now stand-out in a noisy, crowded market with a professional and engaging brand.

We also worked with their 4 group sub-brands and specifically tailored each proposition to their target demographic with crafted designs and marketing tools.



**bfp**

Independent  
Financial  
Advisers

# The challenge.

Bromwich Financial Planning (BFP) are an established financial planning firm who blend traditional values with a modern approach.

Having recently integrated the moneyinfo software into their service offering, they needed a contemporary brand to reflect their technical progression and position them as a forward-looking business.

So, the PLOTT team set about modernising the brand whilst still appealing to their long-established client base who believe in traditional advisor relationships.

bfp moneyinfo

bfp moneyinfo

YOUR F



### A clear and uncomplicated view of your finances, all in one place

Available on



Access your information when you need it

Your investments, savings, pensions, insurances, bank accounts, credit cards, store cards, mortgages, loans and property alongside all the associated paperwork.

On your desktop and as an app on your tablet and smart phone, your finances are brought together under a single login accessible to you at any time, wherever you are.

YOUR FINANCES IN ONE PLACE

### Features that streamline your daily life:



View your investment portfolio



Quickly access your insurance details



Track your property values



Manage your income and spending



Safely store all your important documents

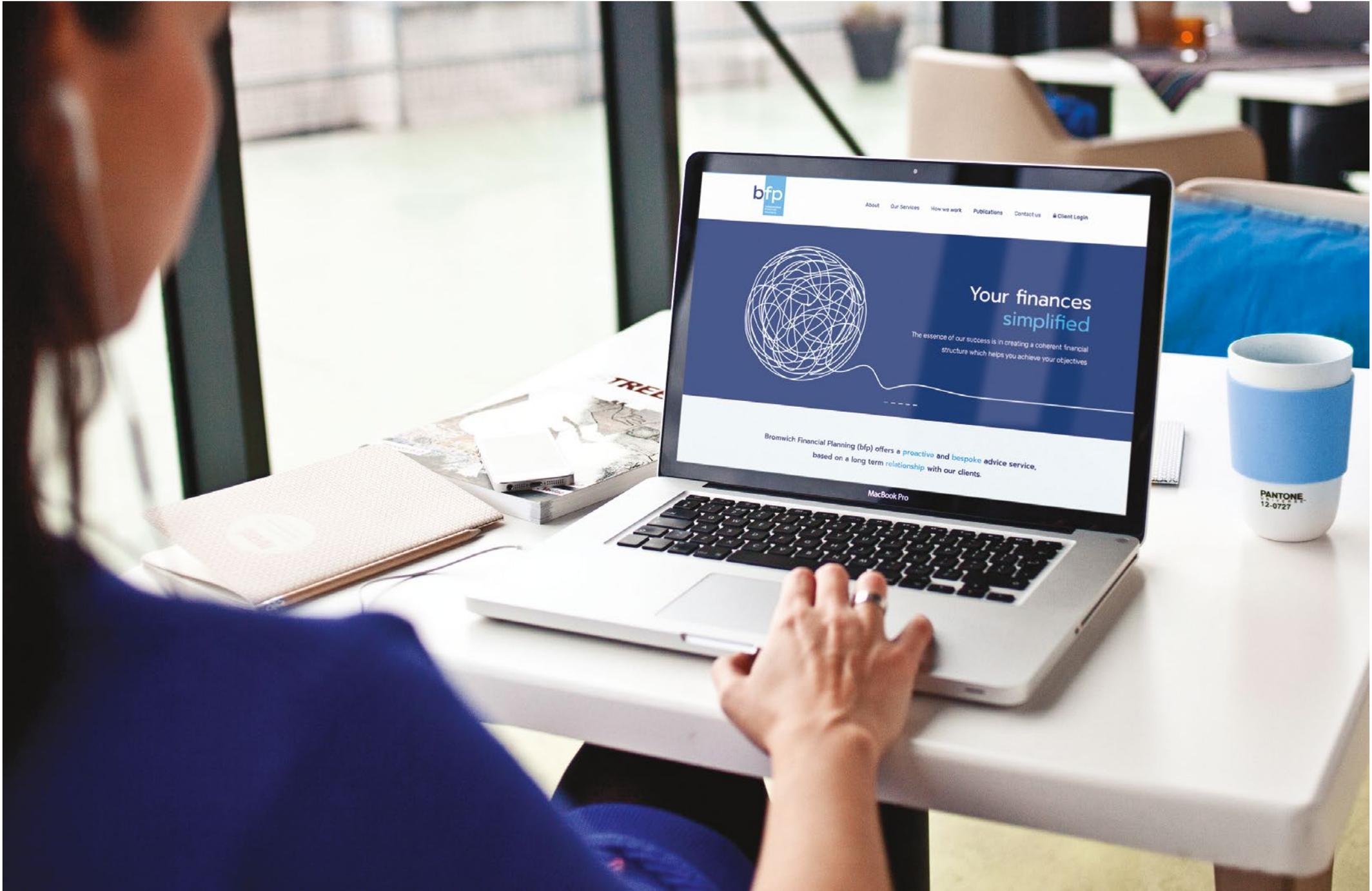


Be reminded about your renewals, income and payments

### What do our clients have to say?

For the first time I can see what I'm worth. I can see my home going up in value as well as what my savings are doing. I feel in control and I feel more confident making important financial decisions.





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PLOTT have a real energy and enthusiasm to meet your objectives. The team easily understood our brief and worked with us to bring a fresh perspective to my original vision. It had been a long time since we'd reviewed our 'brand' and we are delighted with the outcome and the relationship we have with the team.

**NIGEL BROMWICH | MANAGING DIRECTOR**



**bfp**  
Independent  
Financial  
Advisers

**YOUR FINANCIAL ARCHITECT**

## Your finances simplified

The essence of our success is in creating a coherent financial structure which helps you achieve your objectives

**bfp**  
Independent  
Financial  
Advisers

**YOUR FINANCIAL ARCHITECT**

## Built on solid foundations

As financial architects we believe that strong client relationships are key when building a co-ordinated financial structure for clients

**bfp**  
Independent  
Financial  
Advisers

**YOUR FINANCIAL ARCHITECT**

## Growing together

By working with you to build discipline to your financial affairs, we will help you to regain control of your financial future

**bfp**  
Independent  
Financial  
Advisers

**YOUR FINANCIAL ARCHITECT**

## Working together

Understanding your unique financial needs is important to us and this is reflected in our personalised approach to each client





# The solution.

BFP's founder likened financial planning to the 'Gordian knot' with overly complex and difficult language. He was keen to dispel this myth.

We loved this analogy and used our creativity to craft the brand around it. We designed illustrative graphics to represent simplicity and unravelling the knot.

We re-invigorated the brand with a secondary colour palette and tweaked the logo to freshen the look.

We combined this with a stylish new website, innovative app visuals, modern printed literature, and team photography to harmonise all client touch points.

# Credit

Flexible business funding

# The challenge.

As one of the original entrants in the alternative business funding sector, Credit4 developed their brand quickly but with little thought about future marketing aspirations.

Credit4's new Marketing Director had previously worked with PLOTT at Clifton Asset Management where we designed their 'Alternative Business Funding' portal branding. Our unique knowledge of the sector meant we understood the challenges.

We knew 'alternative funding' suffered negative perceptions and lack of trust, nonetheless we realised Credit4 had a great story to tell. But their visual brand, told a different story!

After winning a 3-way pitch, we set about morphing their identity and reputation into a trustworthy brand to relaunch at NACFB.

{ SIGNAGE | WEBSITE | PULL-UPS | STATIONERY | LEAFLETS }





Credit 4

+44 (0) 20 3637 0570 applications@credit4.co.uk Broker Login (Coming soon)

Reach your growth potential  
with flexible business funding

Credit 4

020 3637 0570 brokers@credit4.co.uk Broker Login (Coming Soon)

### Latest Case Study

#### SGP Garden Machinery Ltd – Derbyshire

Stephen and Sue, from family business SGP Garden Machinery, needed funding to help them expand their showroom. Watch their story to see how Credit4 worked with SGP to grow their business.

**Product:** Dual Growth and Flexible Funding Facility

**Funding:** £30,000 over 24 months



Any questions?

If you're looking for funding to grow your own small business talk to one of our Relationship Managers.

Call us on 020 3637 0570 or message us below.

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Having grown Credit4 from a start-up, we required a specialist type of marketing agency, especially experienced on the creative front to bring our brand together. PLOTT met with us, got to know us and what motivated us, and delivered a brand that we believe is unique and reflects how we treat our clients. No other agency who pitched for this job came as close as PLOTT did in ‘getting it right’.

MARK JOHNSON | MANAGING DIRECTOR



Credit **4**  
Flexible business funding

## Dual Growth Funding

Two types of funding, one agreement

- Loan amounts of between £30,000 and £100,000 for terms of 12 to 24 months
- Access to a term loan for part of the total funding requested, repayable monthly
- Access to a Flexible Facility for part of the total funding requested
- Dual Growth Funding is an unsecured loan which must be supported by a suitable personal guarantee from all Directors/Principals of the business

Call 0203 637 0570

[www.credit4.co.uk](http://www.credit4.co.uk)

[applications@credit4.co.uk](mailto:applications@credit4.co.uk)







**credit 4**  
Flexible business funding

# Dual Growth Funding

**2 types of funding in one agreement**  
For SME's that have been trading  
for at least 3 months

## Dual Growth Funding

### Flexible Funding Facility

Flexible Funding Facility for a proportion of the loan

- Interest only period payable by the end of the term
- Draw and repay costs during the term (subject to maximum number)
- No maximum number of repayments
- Available financial guarantees are repaid from Treasury Proceeds of the borrowing business

### Term Loan

Term loan for a proportion of the loan

- Repayable monthly
- Repaying costs during the term reduces the overall cost to fully amortise over the life of the loan
- Subject to financial guarantees are repaid from Treasury Proceeds of the borrowing business

### How it works

- 2.5% per month charged on drawn funds (interest charged daily and paid fortnightly)
- 0.5% per month charged on undrawn funds (interest charged daily and paid fortnightly)

**Contact your Business Development Manager for more details**  
David Calverhouse | 07850 931 406 | davidcalverhouse@credit4.co.uk

**Call 0203 637 0570**  
www.credit4.co.uk  
applications@credit4.co.uk

This information has been prepared for information only and does not constitute an offer of credit. It is subject to credit checks and other conditions. The information will not be made available to third parties without the express consent of Credit 4 Limited.

# The solution.

PLOTT took time to define Credit4's key proposition and translate their USP's into a credible, dependable brand. The new persona enabled them to reach their desired brokers and build a consumer channel to attract direct business.

We transformed their image with a modernised logo, complimentary colour palette and consistent document templates for product fact sheets, presentations, newsletters and emails.

We designed a new website which exudes digital competency and clearly defines Credit4's products. The easy to manage site is simple to update with a WordPress CMS.

To build a credible reputation we filmed case study client videos for authentic experiences of Credit4 products and services. This positioned them as a viable alternative to traditional lenders.

With a new funding line secured, we also developed a sales toolkit including exhibition and networking collateral to raise their profile and professional reputation.

{ SIGNAGE | WEBSITE | PULL-UPS | STATIONERY | LEAFLETS }



**DEBT GUARD**  
S O L I C I T O R S

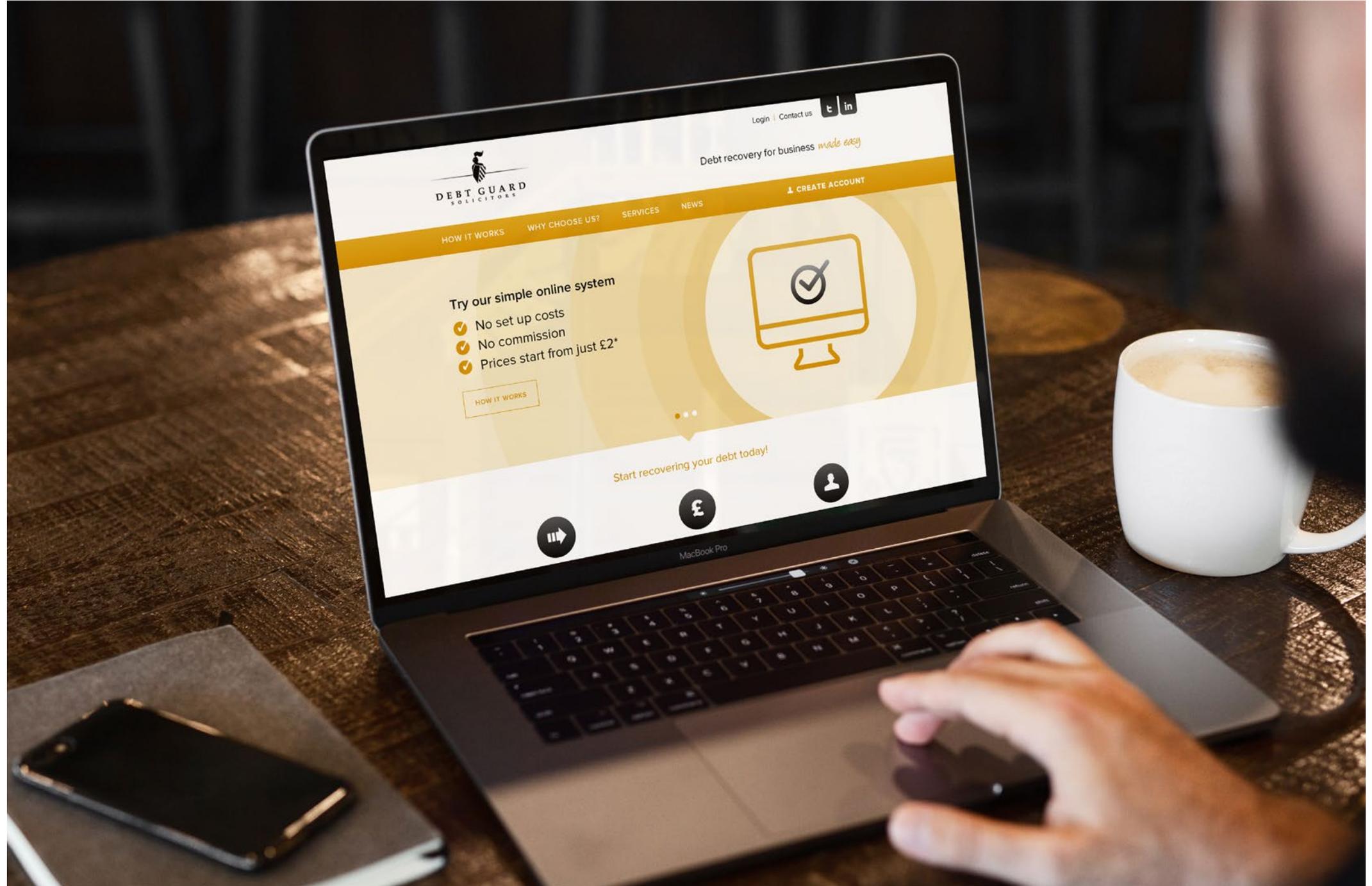
# The challenge.

Debt Guard is a pioneering, online service from the Irwin Mitchell Group for businesses to recover debt quickly and efficiently.

Our brief was to create a brand and website as fresh and innovative as their proposition!

The design needed to compliment the overall Irwin Mitchell brand and target small business owners juggling debt management.

They desired a responsive, search engine optimised website to drive highly targeted traffic and increase conversion rates via their in-house pay per click campaigns.



DEBT GUARD  
SOLICITORS

Login | Contact us

Debt recovery for business *made easy*

HOW IT WORKS | WHY CHOOSE US? | SERVICES | NEWS | CREATE ACCOUNT

Try our simple online system

- ✓ No set up costs
- ✓ No commission
- ✓ Prices start from just £2\*

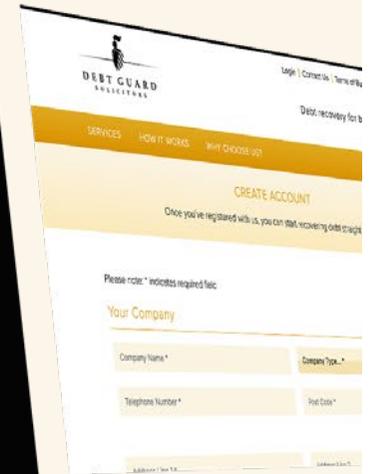
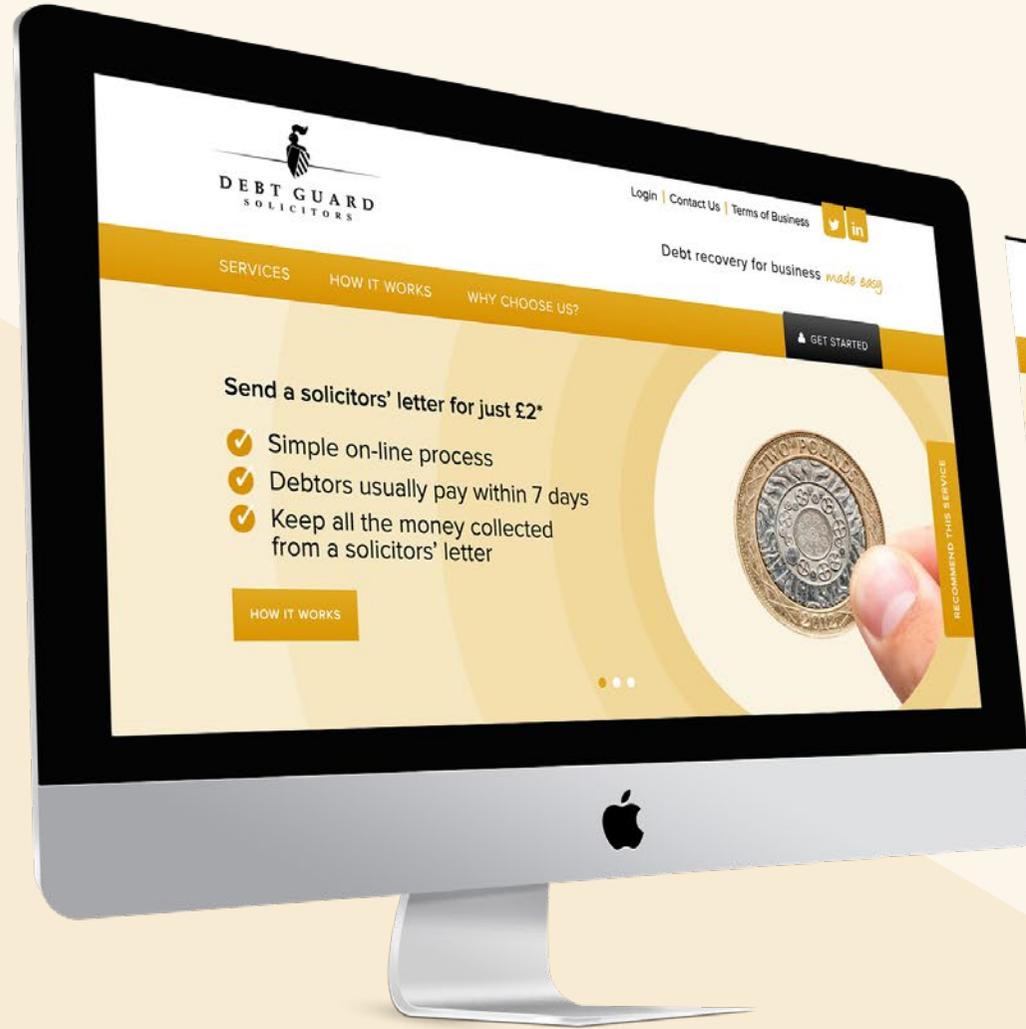
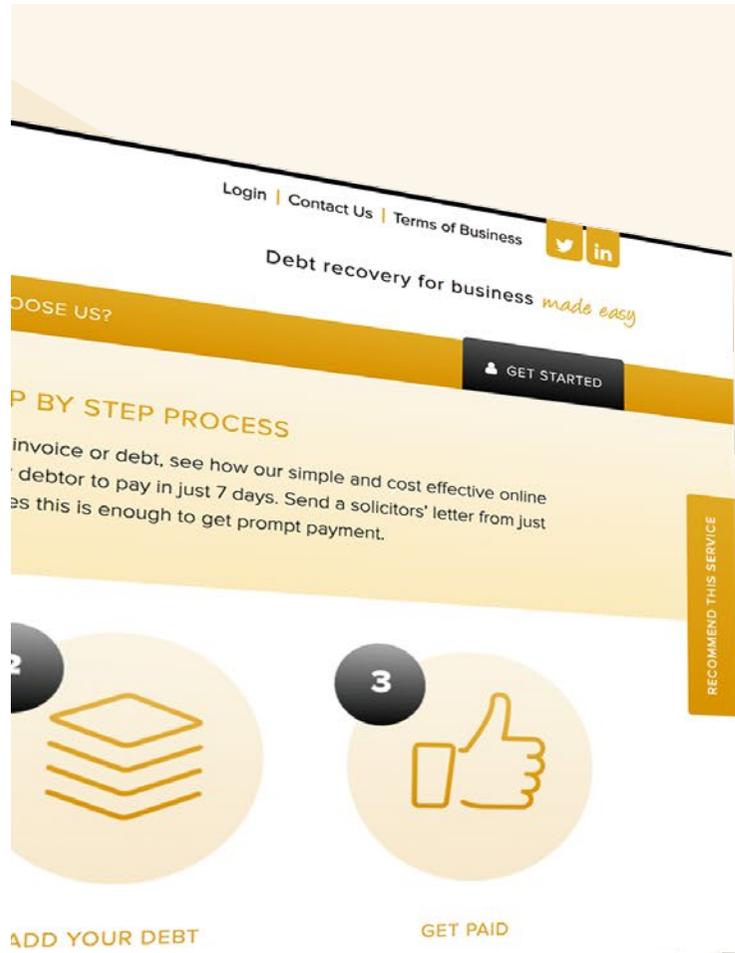
HOW IT WORKS



Start recovering your debt today!



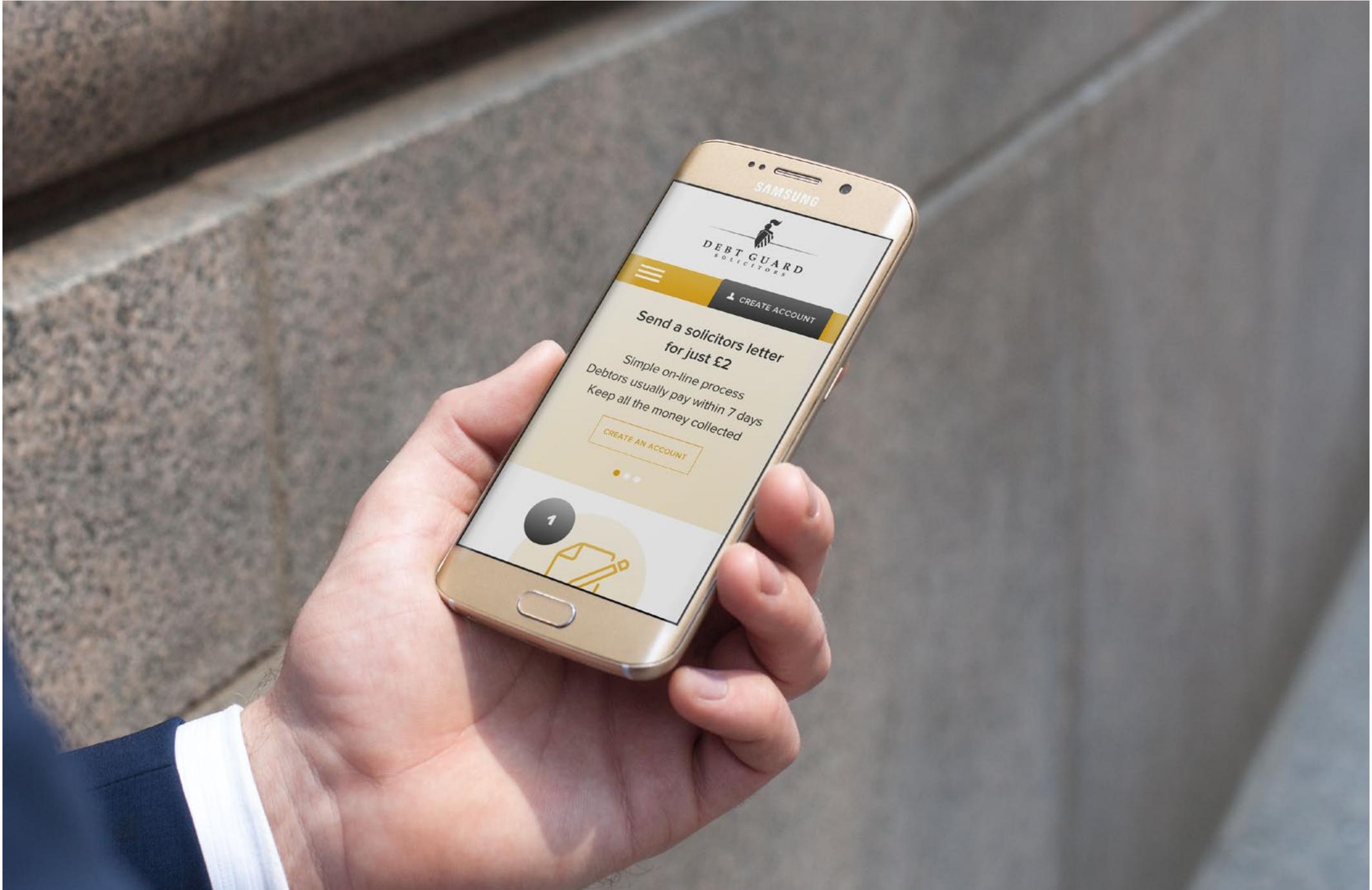
MacBook Pro



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Our challenge was to boost online registrations. As Debt Guard is solely an online proposition, it was essential that our chosen agency mastered the concept that the website functionality was key for our business model. I just wanted to express my massive thanks for all their hard work in helping us get the site live, and just to add, we are well on our way to reaching our sign-up targets.

IAN FOWLES | CHIEF TECHNOLOGY OFFICER





# The solution.

We freshened up the brand imagery and simplified content messages to be clear and succinct for time-poor small business owners.

We developed a seamless user journey with easy-to-use online registration which was key to increasing user engagement. Integrating a third-party API directly to their database ensured maximum data capture and targeted marketing.

UX and usability testing was crucial and close monitoring of all hits since launch has demonstrated a positive uplift in organic SEO traffic, as well as significant increases in paid-for media conversions.

Testament to the success of the website, Debt Guard are now partnering with other organisations to expand their client base. Our most high profile dual-brand is the FSB collaboration which involved providing a white-label version of the website to their membership.



Provided by  
  
**Dignity**<sup>®</sup>  
CARING FUNERAL  
SERVICES

# The challenge.

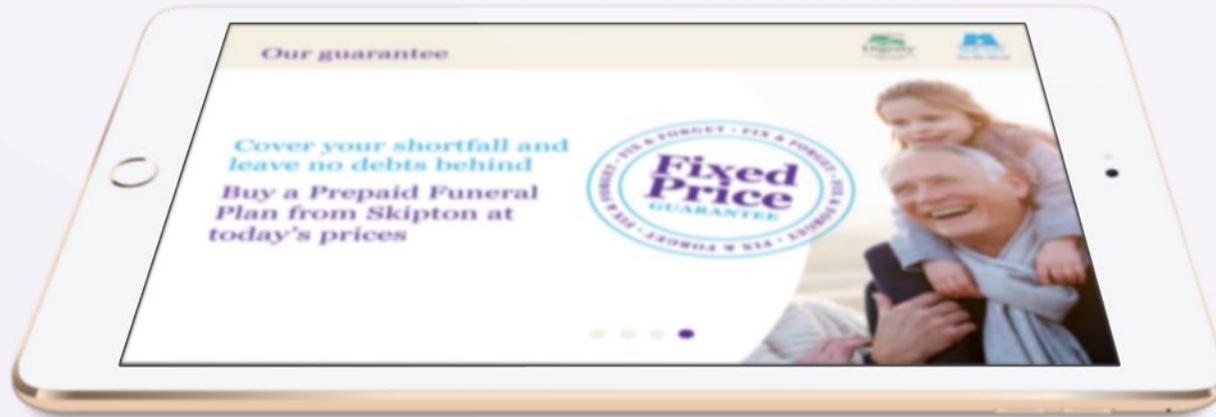
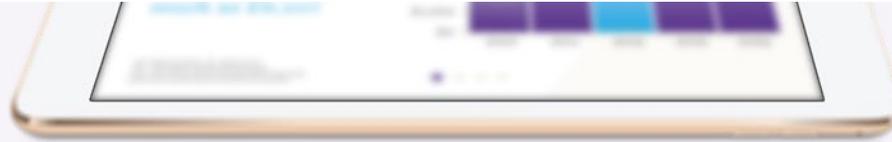
Dignity are one of the UK's leading providers of pre-paid funeral plans and a FTSE 250 company. They have both direct channel and introducer channel strategies.

PLOTT had to deliver an innovative suite of electronic sales aids to replace previous traditional printed material in ring binders.

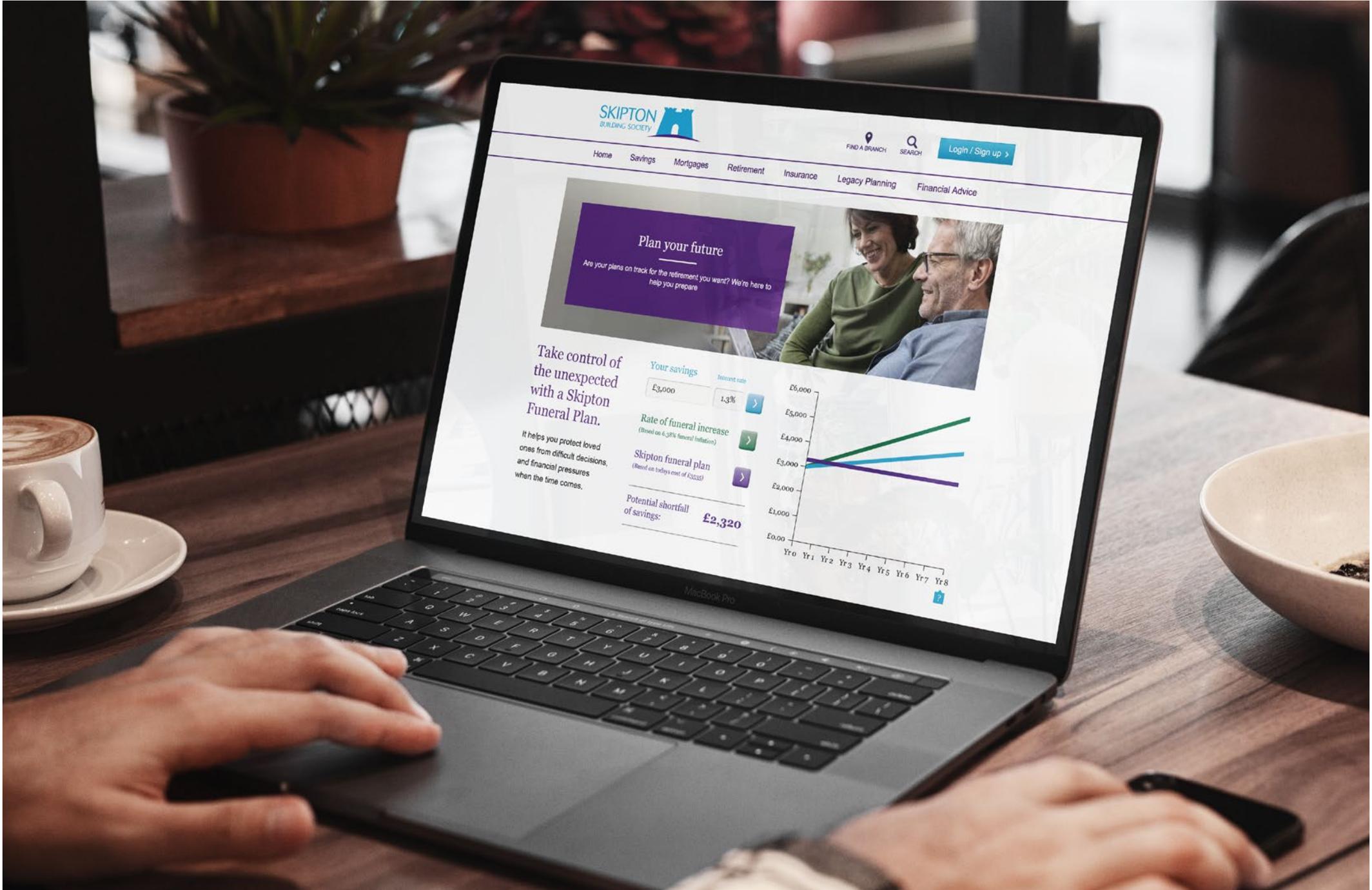
Building Society advisors needed digital sales collateral to introduce, explain and sell Dignity's pre-paid funeral plan.

The design had to be memorable, engaging and respectful to help intermediaries discuss the emotive subject with clients.









# The solution.

We crafted an interactive digital brochure optimised for iPads. Acting as a visual guide the design incorporates a non-linear structure, so advisors can easily navigate areas as conversation flows.

Competitor research indicated the need for a unique creative strategy. The innovative approach and difficult subject were combined to offer a compassionate digital customer experience to a younger audience.

The designs were sympathetic to existing brand guidelines but harnessed the latest digital technology for optimum usability on tablets.

Our interactive funeral cost calculator giving instant figures proved so popular for advisors we've since created a standalone widget for partner websites. The digital capabilities of centrally updating content and instantly pushing out to all advisors is key to keeping the app current, relevant and within the latest FCA regulations.

 **money**info

# The challenge.

As a trailblazing Fintech disruptor with multiple high-profile awards, moneyinfo needed a creative partner who could help elevate their brand to the next level.

Their unique account aggregator software delivers powerful functionality but the previously 'clunky' in-house visuals were lacking in interface design and negatively impacted user experience.

As a challenger to all traditional Fintech offerings they needed to ensure the moneyinfo app not only worked great but looked great too.

The priority was the redesign of key elements of the money info app which included the creation of a much improved fluid UI. Alongside this the sales and marketing teams required us to redesign the marketing material for consistency and to clearly explain the USPs and cutting-edge technology with maximum target impact for each audience.



moneyinfo

THE PLATFORM FOR DIGITAL  
CUSTOMER ENGAGEMENT

moneyinfo

### See the bigger picture

moneyinfo brings together data for investments, savings, pensions, property, banking, credit cards, mortgages and insurances.

“

Nearly 60% of UK consumers want a single marketplace to access financial services and 42% are frustrated with managing multiple accounts as a result.

[WWW.REALWIRE.COM/RELEASES](http://WWW.REALWIRE.COM/RELEASES)

Build stronger and longer relationships

Create more meaningful relationships by helping customers to understand the full picture of their current situation and use this data to offer services that can deliver them better financial outcomes.

moneyinfo will help move your transactional customers to regularly engaged consumers.



“

PLOTT's approach was clear and they made some great suggestions on how we could reuse content across multiple platforms to keep the costs down and get maximum impact for our budget. As our business continues to grow, it's reassuring to know that we have an agency partner that can support us to deliver our vision.

OLIVER JENKINS | MARKETING MANAGER



**Home**  
Viewing as Anna

Me Help Log Out  
Last logged in 15/05/2017 10:10:58

### Your Feedback

How likely are you to recommend Moneyinfo to a friend?

1 2 3 4 5  
6 7 8 9 10

0 - LEAST LIKELY 10 - MOST LIKELY

### Account Balances

Banking	
Bills A	
Lloyds	£51.00
Credit cards	£99.34
Barclaycard	-£517.44
Savings	
Halfax savings	£5,258.00

### Disposable Income

This month: £0.00  
Last month: £0.00  
Total for 0 month: £16,021.12

### Investments Update

### Spending

Property Costs (42.42%)	£27,463
Utilities (9.29%)	£6,015
Living (15.52%)	£10,050
Leisure (2.87%)	£1,856
Loans/Credit/HP (29.90%)	£19,362

### Investments Overview

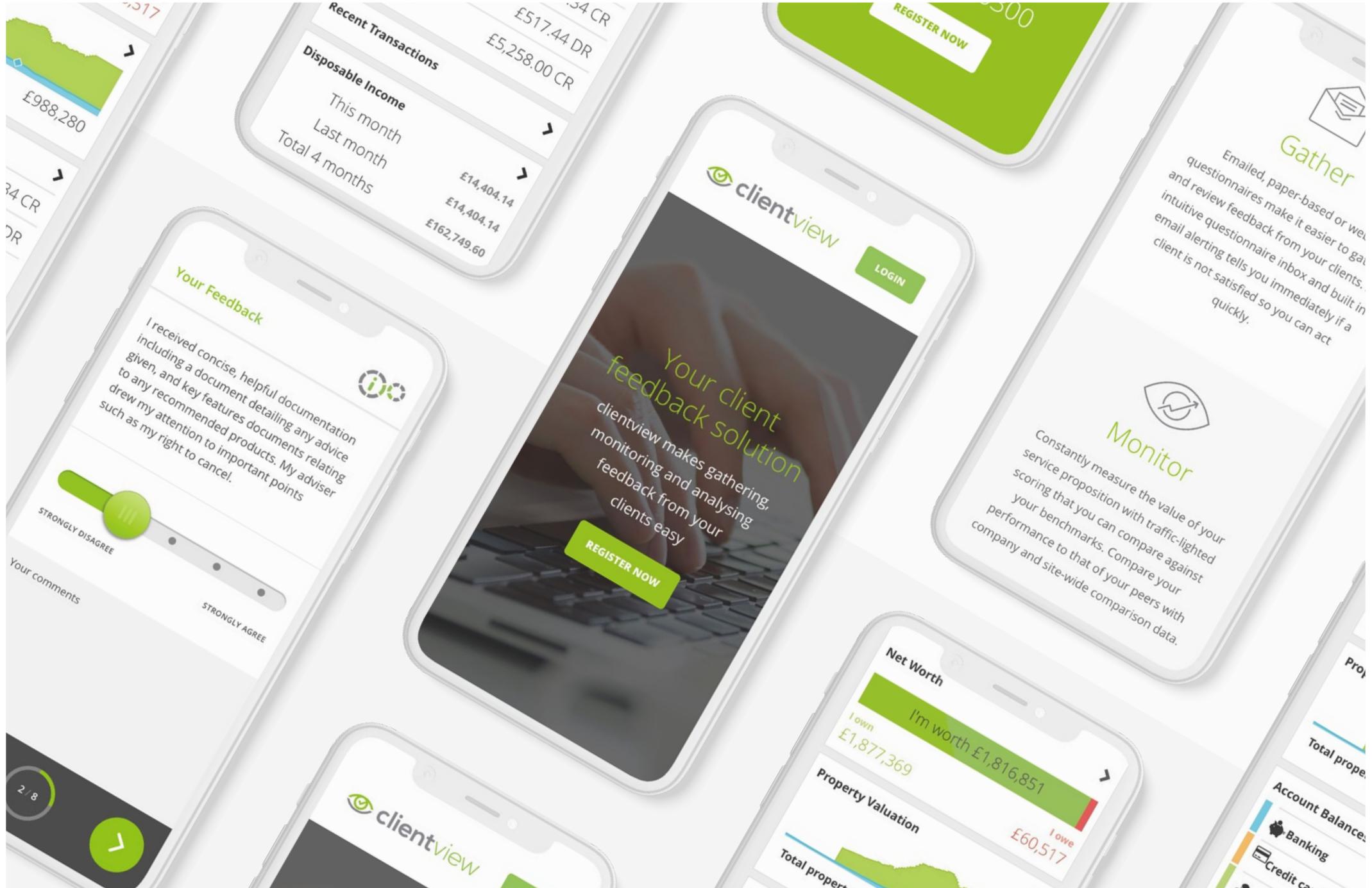
Total Valuation: £1,931,402

### Portfolio Split

Physical Assets (51.17%)	
Retirement (12.79%)	£988,280
Savings & Investments (3.10%)	£246,962
Stocks & Shares (32.94%)	£59,887
	£636,272

### Net Worth

I own: £1,936,810  
I'm worth: £1,876,293  
I owe: £60,517



# The solution.

Working with their internal marketing and development teams we learnt how the moneyinfo app worked and crafted a visually appealing UI which is user friendly, easy to navigate and intuitive to use.

We then designed a suite of supporting marketing collateral and imagery including: multiple infographic explainer videos, digital brochures, product web pages and team photography.

Finally, we developed a suite of white label marketing assets which could be rebranded for moneyinfo's reseller network. Providing each reseller their own white labelled moneyinfo app, explainer video and supporting digital literature has enabled moneyinfo to quickly become the number one financial aggregation tool in the market place.



SecureTrust  
Bank

# The challenge.

Hot off the press!

Secure Trust Bank are one of our newest finance clients, and came to us through a recommendation of another of our clients - Credit4.

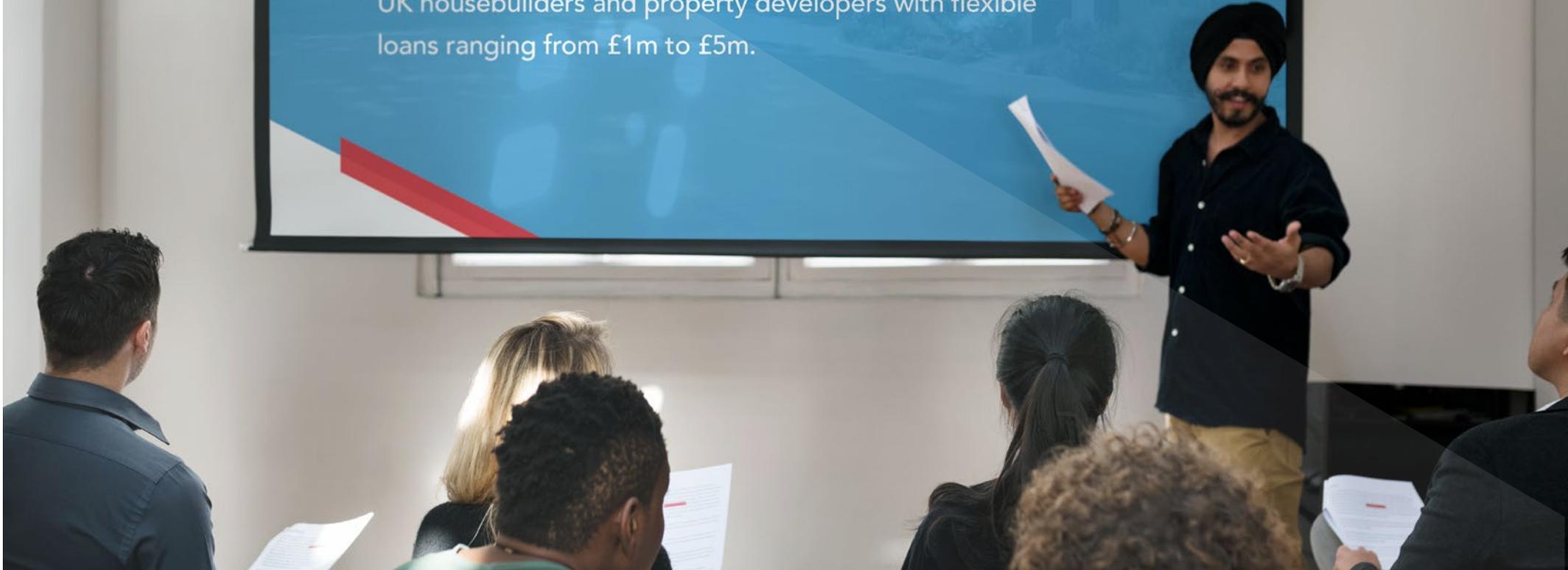
As a residential development finance specialist, STB needed a creative and digital partner to help freshen up their marketing collateral and develop a distinctive visual style to accompany an exciting new funding campaign backed by the British Business Bank.

The aim of the campaign is to attract new clients to take up the funding on offer, and make the accompanying materials eye-catching and memorable.



# MAKING HOMES HAPPEN

Our dedicated team of funding experts are supporting UK housebuilders and property developers with flexible loans ranging from £1m to £5m.





...urable and the rice should be firm but  
...it a crunchy center. If the rice is still  
...done, add 1/4 cup very-hot water and stir  
...creamy. Repeat as necessary.  
...season to taste with soy sauce, fish sauce  
...and black pepper.  
...\*We made our mushrooms  
...grinding dried mushrooms in a  
...er. A spice grinder would work better.

**HOW TO INCORPORATE UMAMI INTO YOUR DIET**

- Shave or grate parmesan, pecorino, or other aged cheese over vegetable salads.
- Add smoked meat to soups or stews.
- Add tomato paste to soups, soups, sauces, casseroles, dressings, etc.
- Spread olive tapenade on crostini, sandwiches or salads.
- Use Worcestershire in marinades for meats and vegetables.
- Add a dash of soy sauce to sautéed vegetables even when you're not eating Asian food.
- Add a dash of poultry powder to steams, pilafs, soups, stews or casseroles.

**MAKING HOMES HAPPEN.**

Our team of property experts is dedicated to supporting UK housebuilders and developers with flexible loans ranging from £1m to £5m.

 **Secure Trust Bank**

Call us on **0330 303 1295**

Visit [www.securetrustbank.co.uk](http://www.securetrustbank.co.uk)

Secure Trust Bank PLC. Registered in England and Wales 541132. Registered Office: One Arleston Way, Solihull, B90 4LH. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Our registration number is 204500.  
Real Estate Finance is not regulated by the Financial Conduct Authority or the Prudential Regulation Authority.

# The solution.

Working within existing brand guidelines, we created a distinctly British campaign. A powerful campaign strapline - 'Making Homes Happen' - was teamed with a red, white and blue colour palette and impactful quality imagery.

The first printed campaign advert is in circulation, and we're currently developing a presentation for the sales team to use in their funding meetings.

We've also created an interactive funding form with an easy-to-follow layout, helping to streamline the application process.

This campaign is still in progress with more assets in the pipeline, so watch this space!

# PLOTT

Your story starts here

**Do you need help bringing your brand to life?**

Call [01675 434583](tel:01675434583)