



Case Study:

Brand Alignment After Years of Aggregation

With an eye on advisor retention and recruitment, the new brand reflected the firm's next guard of leadership, its appetite for technological innovation and organizational growth — without losing ties to its relationship-focused culture.



Overview

After 40+ years of organizational success, a mid-sized regional firm came to F2 seeking a brand refresh to preserve its legacy while moving toward continued advisor growth and empowerment. We helped them develop a cohesive brand that included a new name that united the four separate firms. The new name honors the firm's promise to challenge norms within the industry and unceasingly refine and innovate — keeping the needs of its financial professionals and their clients as the north star in decision-making.



Challenge

The holding company is composed of two broker-dealers and an RIA, all of which had their own name in their branding. To reach a larger market outside of their original footprint and carve out a truly competitive space in the market, the holding company needed to modernize its brand so it could be recognized as one entity rather than four disparate units. It was important to leadership that the new brand encompassed who the company is, the people that work for it, and the advisors that partner with it.



Outcomes



The overall outcome/result is advisor retention and increase of advisor recruitment. We needed to balance the old with the new to make sure everyone had a home. Make room with new advisors without losing the existing advisor population.

Core tenets provide a backbone for marketing and internal comms. It sets the tone and vision of your firm, which allows you to emotionally connect with the people who work there and who you want to attract. Our business can lose sight of this and say generic things like “culture”... What kind of culture? Is this a place I belong and will thrive? By claiming tenets, you're also identifying and attracting your Ideal Advisor Profile.

It's more than a name. It's an identity that allows the Home Office to centralize firm growth efforts, which is where we see firms succeed. Bifurcation and siloed efforts create disjointed advisor and client experiences, which prevent growth.

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