



Don't Navigate Your Financial Future Alone

When life happens, making good financial decisions can be tough. Let Us Guide You through it...

Schedule your complimentary appointment today:

Phone: 877-254-9328, x5042
Email: Investments@Western.org

Western MEMBERS' FINANCIAL SERVICES

Securities and insurance products offered through LPL Financial and its affiliates. Member FINRA/SIPC.

Not NCUA Insured No Credit Union Guarantee May Lose Value

*Financial Consultants do not offer specific tax advice. We suggest you discuss your specific tax issues with a qualified tax advisor.

Poster

After years of slow growth, I rebranded Western Members' Financial Services, the wealth management arm of Western Federal Credit Union, accomplishing these goals:

- Increase awareness.** I placed signage and collateral in all 31 branches (*samples shown*) and executed targeted direct and email campaigns to the credit union's 130,000 members.
- Position investment advisement services as a necessity, not a luxury.** The recession left many members feeling that they had little wealth to manage. "Let Us Guide You" was non-threatening and inclusive.
- Make investment advisors relatable.** Advisor profiles were revised to include personal anecdotes and a description of their investment approach.
- Bridge the sales/marketing gap.** Investment advisors strengthened working relationships with branch managers in regular meetings; branch staff were incented for referrals; Sales 101 training workshops helped investment advisors and branch staff educate members and overcome objections; increased internal communication about Western Members' Financial Services campaigns informed all team members.
- Increase introductory appointments.** I organized a series of outbound sales call events. Investment advisors were given goals and offered incentives. Appointments well exceeded our expectations.

This integrated campaign doubled assets under management in one year despite a skeptical economy.



Mailer



Buckslip

