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

1. **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.
2. **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.
3. **Make investment advisors relatable.** Advisor profiles were revised to include personal anecdotes and a description of their investment approach.
4. **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.
5. **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.

Poster

Mailer

Buckslip