brand voices

Speak Your Story. Grow Your Business.

Introducing BrandVoices

Most advisor stories sound the same. That's not a criticism of advisors — we understand it's a result of industry regulations that encourage safe, sanitized language. The result? Flat, forgettable brand stories that don't reflect the depth of who you truly are.

And that's why we created BrandVoices.

Through a combination of AI interviews, proprietary content mapping, and experienced creative professionals, we turn flat stories into compelling, multi-dimensional brand narratives.

BrandVoices takes your interview answers, creates a long-form story and turns it into ready-to-use content for both traditional and digital applications. A BrandVoices content package includes the following deliverables:

– Core Brand Story
– Mission, Vision & Values statements
– LinkedIn company bio
– Sample LinkedIn posts
– Sample Marketing and event ideas

Let's take a look at these deliverables in more detail…

Meet David Thompson, CFP®

David, or Dave to his friends, is the principal of Thompson & Associates, a private wealth advisory practice of Ameriprise Financial Services, LLC.

He's also not real.

We respect the confidentiality and privacy of all BrandVoices users, so we're sharing excerpts from a fictional user.

Thompson & Associates: Old Story

Here's how Dave used to tell the story of his practice **before** BrandVoices:

"Thompson & Associates is a private wealth advisory practice with over 20 years of experience helping clients pursue their long-term financial goals. We offer personalized financial advice based on a comprehensive planning approach, powered by a team of specialists. Thompson & Associates is committed to helping clients feel confident about their financial future."

Sound familiar? It should. It's the story equivalent of white noise.

Dave completes the BrandVoices interview: a thoughtful questionnaire about his background and business, designed to pull out the drivers of his success.

The BrandVoices algorithm synthesizes those inputs, combines them with insights curated from over 1,400 advisor-client engagements and screens them for SEC and FINRA compliance. The result? A new brand story rooted in authenticity, emotion, and connection.

Prepare | **Answer** | **Analyze** | **Deliver**

Thompson & Associates: New Story

Here's how Dave tells the story of his practice **after** BrandVoices:

"At Thompson & Associates, we believe the most profound lessons about money come from watching how families navigate challenges and create opportunities. Our founder learned this observing how thoughtful financial decisions create stability and peace of mind — principles that became the cornerstone of our distinctive approach.

What sets us apart is recognizing that every family's financial journey is unique. We begin with your answers — understanding what security means to you, what legacy you want to create, and what dreams fuel your days. These conversations help inform every recommendation and strategy we develop together.

With over two decades of experience, our team understands that behind every investment goal is a human story. Whether you're planning for college, considering retirement strategies, or exploring legacy options, we are focused on four critical areas: exploring stable income strategies, discussing investment approaches for lifestyle goals, reviewing protection planning, and considering legacy plans that may honor your values.

Our philosophy centers on a simple principle: money and investments are tools, and we believe the true measure of success is the confidence and security our clients seek. By combining time-tested principles with financial planning strategies, we work to help create futures that may align with your unique dreams. Our goal is that every decision we make together, moves you closer to the opportunities you seek for yourself and future generations.

The transformation isn't just cosmetic — it's strategic.

Before: Generic. Safe. Easily overlooked.
After: Human. Memorable. Authentic.

That's the power of BrandVoices.

Dave’s story can be edited, reconfigured and brought to life across all Thompson & Associates marketing materials including:

LinkedIn Bio

At Thompson & Associates, we understand that every family's financial journey is unique. With over two decades of experience, we begin by listening — understanding what security means to you, what legacy you want to create, and what dreams drive your decisions.

Our approach centers on four critical areas: stable income strategies for essentials, investment approaches for lifestyle goals, protection planning for the unexpected, and legacy plans that honor your values. We recognize that behind every investment goal is a human story.

What sets us apart is our philosophy that money and investments are simply tools. The true measure of success is the confidence and security our clients achieve. We've learned that families want to feel connected to and in control of their financial future.

Whether you're planning for college, considering retirement strategies, or exploring legacy options, we combine time-tested principles with personalized financial planning. Our goal is to help create futures that align with your unique dreams and values, ensuring every decision moves you closer to the stability and opportunities you seek for yourself and future generations.

Mission, Vision and Values

MISSION

To work with families in exploring financial strategies that align with their unique dreams and values by combining time-tested principles with personalized planning approaches.

VISION

To serve as a trusted financial partner where every family's unique story helps inform thoughtful financial discussions that contribute to generational peace of mind.

VALUES

Story-First Planning

We believe every financial decision should begin with understanding your personal narrative, dreams, and what security truly means to you.

Generational Stewardship

We think beyond individual goals to consider how today's choices can create opportunities and stability for future generations.

Purposeful Wealth Building

We view money as a tool for creating the life you envision, not an end in itself, focusing on the confidence and peace of mind that thoughtful planning brings.

Authentic Partnership

We build relationships through genuine conversations and deep listening, recognizing that trust is earned through understanding, not just expertise.

Accessibility & Partnership

We blend time-tested financial wisdom with fresh perspectives, always asking how we can better serve your unique circumstances and evolving needs.

Dave's content package also includes examples of engaging LinkedIn posts, and unique marketing events that support his brand story – all delivered with comprehensive instructions to help him make an immediate impact on his marketing and communications.

Your breakthrough story and content package are a click and a conversation away.

In just 20-30 minutes, you can transform years of experience, passion, and expertise into a powerful brand story that sets you apart from every other advisor in your market. Within 48 hours, you'll have a complete, compliance- ready content package that's ready to implement across your website, LinkedIn, and marketing materials.

Your unique story is your greatest competitive advantage. Don't let it go untold.

www.BrandVoices.com **1-888–BRAND-80** (1-888-272-6380)