

### OUR MISSION

Our systems and teams help our clients discover and realize their vision through strategic communications.

### OUR VISION

We create top-of-mind awareness for our clients that builds increased opportunity, growth and strength.

### OUR VALUES

We understand that integrity and respect for one another in our practices is a prerequisite of success.

## AN EQUATION FOR SUCCESS - N+I+R=S<sub>2</sub>



### Energize Your Business

Perception, Inc. has developed a solid reputation in the financial services industry as a strategic communications provider that has achieved results with the clients we serve. It is through our experiences that we have learned one undeniable truth about this industry - to achieve success you must have a memorable Name, the right Image, and an uncompromised Reputation. A company that achieves these qualities can achieve Success on a much grander scale.

In every company we work with, we address:

#### **N = Name**

Your name is more than just the words on your business card. It is the emotion that it stirs in your target audience. This means you need to know what is memorable about your company, what you stand for as a business, the benefits you provide the end-user, and who you are as a professional. Once you know the answers to these questions you put them into words and create your "verbal brand". This is the first part of the equation.

#### **I = Image**

Too many financial service providers/professionals do not understand that the images they create need to tell their story...their verbal brand. Your visual brands need to communicate your messages on their own. If they do not, they are not achieving their purpose. This is the second part of the equation.

#### **R = Reputation**

It is imperative to not only create a reputation, but to manage it as well. Your reputation is developed through specifically designed and implemented public relations, promotions, and marketing efforts geared to raising awareness and increasing sales. Many financial service professionals are concerned about the immediate pay-offs and not the long-term benefits of prudent programming. This is the third part of the equation.

#### **S<sub>2</sub> = Success on a Grander Scale**

When a financial services provider/professional has a memorable Name, the right Image, and an uncompromised Reputation, they can then put the pieces together and achieve success. This is the goal of any strategic communications effort.

### PERCEPTION IS REALITY

Webster's Dictionary defines perception as, "intuitive recognition or appreciation." In the corporate world, sound customer service, efficient accounting, and community involvement all lend a hand in helping form a positive image of your company in the minds of those your company comes in contact with. You depend on customer service representatives, accountants, and key executives to perform those tasks, which are vital to achieving success in these corporate functions. However, another function that greatly enhances the perception of your company, but very few organizations employ it, is media relations.

The act of proactively promoting your company through publicity is just one of many activities a company must partake in to enhance reputation and credibility. The goal, as with all corporate functions, is to develop trust and respect for your organization among your clients, vendors, partners, and the community. To be a successful organization, you must strive to develop a positive perception of your company among your central audiences. In order to effectively conduct media relations activities, you must have professionals in place who can develop a plan and see it to success. Just like having customer service personnel and accountants, professionals who understand the art of publicity can aid in providing a positive perception of your company.

Unfortunately, the ability of having in-house media relations professionals has always been seen as a luxury and not a necessity. Many large financial service companies have their own public relations, media relations, and marketing departments, which allows them to develop name recognition and awareness, but at the same time there are thousands of smaller companies, like independent representatives, financial planners, and brokerage firms who do not have the ability to have these professionals on staff...until now.

Perception, Inc. strives to be part of your team. By providing vital media relations services at a relatively minimal cost, we can help you enhance your audience's perception of you.

### What are the benefits of an effective media relations program?

**COMMUNITY AWARENESS.** By appearing in the media within their own communities, these companies will be held in higher regard among those individuals who utilize their services and among community leaders.

**INDUSTRY AWARENESS.** Many small companies in the financial services industry wish to make more of a name for themselves among those companies and professionals within the same industry. Becoming a recognized professional among industry leaders can enhance stature and clout among your peers.

**EXPOSURE TO MORE CUSTOMERS.** People seeking financial advice and investment assistance will see the names of those clients in their local newspapers, favorite magazines, on their televisions, and on their radios. Someone appearing in those outlets will tend to have more stature as a financial professional than those professionals not appearing in the media. Potential customers will take that into consideration when choosing a company to work with.

**EXPOSURE TO EXISTING CUSTOMERS.** This is a "feel good" benefit. Existing customers who consistently see their advisors appearing in the media will feel better about their decision to go with that advisor.

**GAIN AN INCREASED LEVEL OF CLIENT.** Many advisors are looking to manage the money of individual investors with substantial assets. Those investors are avid readers of newspapers and various financial publications. If they see a specific advisor mentioned and quoted on a consistent basis, they will tend to consider that advisor more than others for their investing plans.

By working with Perception, Inc. you can be introduced to hundreds of local, regional, and national media outlets. The following are a just few of the media outlets we have worked with in the past:

- CNBC
- NBC Nightly News
- Bloomberg Television
- US News & World Report
- Time magazine
- Bloomberg Personal Finance
- Kiplinger's
- Los Angeles Times
- New York Times
- Chicago Tribune
- Washington Post
- Pensions & Investments
- Financial Planning Magazine
- Money Magazine
- Associated Press
- Scripps Howard News Service
- Parade Magazine
- SmartMoney
- Investor's Business Daily
- Wall Street Journal
- BusinessWeek
- Newsday
- USA Today
- Investment News
- Financial Planning Interactive
- CFO
- Investment Wires
- Bloomberg Television
- ABC Affiliates
- NBC Affiliates
- CBS Affiliates
- FOX Affiliates
- Newsweek
- Dow Jones Newswire
- Financial Advisor
- Investment Advisor