

Joe Public UNITED



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PRESENTATION TO

## INVESTMENT SOLUTIONS

PROJECT

## INTEGRATED BRAND COMMUNICATION CAMPAIGN

DATE

6 APRIL 2016

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1. AF IS - INTERNAL CAMPAIGN
2. AF IS - EXTERNAL CAMPAIGN

# 1. AF IS - INTERNAL CAMPAIGN



# SO WE HEARD YOU!

YOU ARE **GUARDIANS!**

**INTERNAL OBJECTIVE:** RE-ESTABLISH  
THE INTERNAL CULTURE AND DEEPLY  
INGRAIN IN THE STAFF WHO YOU ARE  
AND WHY YOU EXIST.

POSITION IS AS INVESTMENT GUARDIANS  
PROVIDING CLIENTS WITH GROWTH,  
CERTAINTY AND COMFORT, HELPING THEM  
TO ACHIEVE THEIR GOALS.

**LONG-TERM EFFORT** IS TO SEED AND  
DEVELOP THE INTERNAL CULTURE.

TO CREATE A NEW INTERNAL CULTURE,  
WE HAVE TO CREATE AN ENVIRONMENT  
THAT **BUILDS YOUR 'WHY' AT MULTIPLE  
TOUCH POINTS.**

BECAUSE IF IT APPEARS IN CAREFULLY  
CONSIDERED AREAS, YOUR 'WHY' BEGINS  
TO BECOME **A PART OF EMPLOYEES' LIVES**  
**AND HAS PURPOSE.**

SO WE **VISITED YOUR OFFICES** AND WE  
WOULD LIKE TO INTRODUCE YOU TO ...



# THE INVESTMENT GUARDIANS

# TEASER CAMPAIGN

DURATION: ONE WEEK







# CAMPAIGN LAUNCH

**ENTER** AS A GUARDIAN.







---

PROTECTORS OF CAPITAL  
NURTURERS OF NEST EGGS  
GUARDIANS OF HOPES AND DREAMS

---

WELCOME

# INVESTMENT SOLUTIONS COAT OF ARMS

TO CREATE A SENSE OF **UNITY AND PURPOSE**,  
THE MANTRA IS BROUGHT TO LIFE BY A  
BESPOKE **COAT OF ARMS**, SPECIFICALLY  
DESIGNED TO EMBODY **THE VALUES** FOR WHICH  
YOU STAND.

THE COAT OF ARMS SUPPORTS THE  
EXISTING BRAND IDENTITY AND IS  
ONLY USED **INTERNALLY** TO ENFORCE  
**THE BRAND VALUES AND COMPANY MANTRA.**

GUARDIANS

PROTECTION

NURTURERS

GROWTH

GLOBAL CAPABILITY

MASTERY



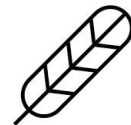
GUARDIANS



PROTECTION



NURTURERS



GROWTH



GLOBAL CAPABILITY

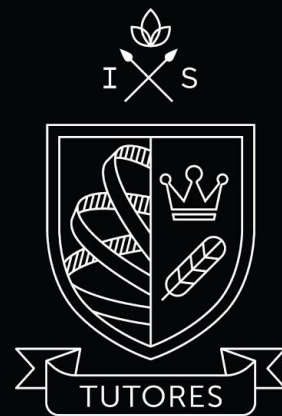


MASTERY









# REVEAL POSTERS



IT TAKES  
**COMMITMENT**  
TO BE A GUARDIAN

At guardians we believe when it comes to investing, one should always look at the bigger picture. It's about standing tall and looking out for what's ahead in the long-term. That's because we know that the benefits of staying invested usually outweigh the short-term mind-set, no matter how unpopular that might seem at the time.

MEMBER OF ALEXANDERFORBES

**Investment  
Solutions**  
with confidence





# IT TAKES MASTERY TO BE A GUARDIAN

It takes a certain personality and a specific set of skills to be a guardian. Much of which is learned, but some of which are intangible or inherent. In addition to these, a guardian is someone who strives for, commits to and hungers to learn and perform in a challenging and constantly evolving environment.

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Solutions  
WITH CONFIDENCE

MEMBER OF ALEXANDER FORBES





A poster featuring a British Royal Guard in a red tunic and bearskin hat. The poster is hanging on a wall with two silver clips. The background is black, and the text is white and green. The poster is for Investment Solutions, a member of Alexander Forbes.

IT TAKES  
**DISCIPLINE**  
TO BE A GUARDIAN

A lack of discipline is never in a client's best interest. A true guardian maintains focus and ensures that emotions are held in check when making decisions. We don't react foolishly to market moods, because a guardian knows that a long-term plan is useless if it's not followed.

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# MANTRA

# MANTRA

We are the guardians of our clients' hopes and dreams.

We protect against the stormy weathers of the economy.

We are the nurturers of nest eggs.

We are the comforters who let many sleep easy.

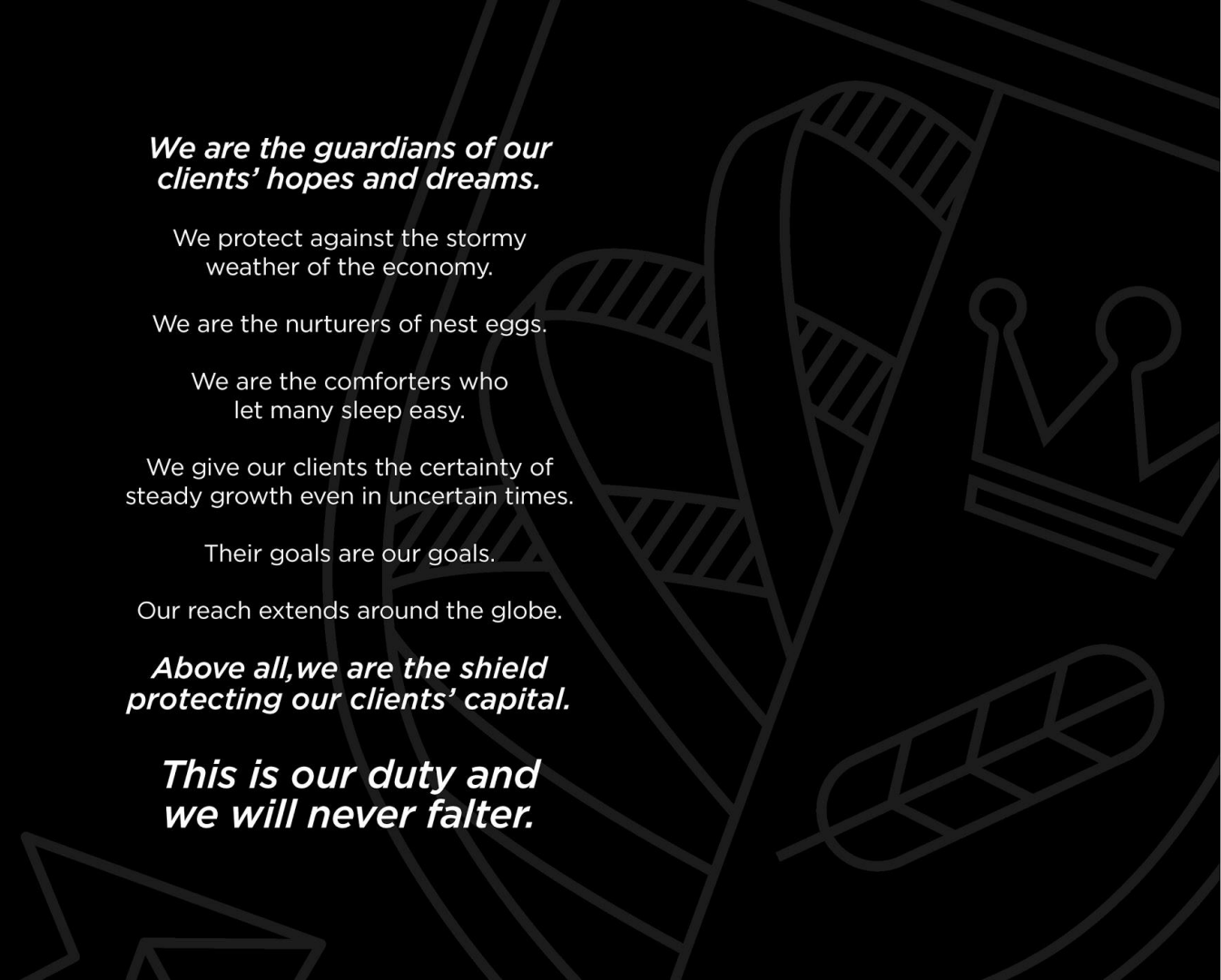
We give our clients the certainty of steady growth even in uncertain times.

Their goals are our goals.

And our reach extends around the globe.

But above all, we are the shield protecting our clients' capital.

This is our duty and we will never falter.



***We are the guardians of our  
clients' hopes and dreams.***

We protect against the stormy  
weather of the economy.

We are the nurturers of nest eggs.

We are the comforters who  
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Solutions  
WE GUARANTEE



**THE LAUNCH WILL BE SUPPORTED BY  
OFFICE BRANDING, DESK DROPS, MAILERS,  
ETC.**

# DESKDROPS



### We're their protectors.

This is your sword. It may not be heavy, but it comes with an important duty. It is our symbol for the fight against a challenging economy, because we seek solid risk-adjusted returns for our clients. We use chivalry and honour to protect ourselves from the temptation to take overly risky decisions. And by weighing up opportunities versus threats, we slice through the volatile forces that sweep the financial world. But we are not fence sitters, we're fencers, using deft strokes to steadily build up the capital we guard.

This is who and what we are.





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WITH CONFIDENCE



**We're their guardians.**

This is your shield. It weighs almost nothing, but its responsibility is great. Obligation always is. And ours is towards our clients, who entrust in us their hopes, dreams, their futures. They come to us seeking a way to keep their capital safe from the volatile forces that sweep the markets. In the end, we're their guardians. We shield them as much as we can from risk and from economic events no one can predict... because with a defensive formation, we'll weather those events to the best of our abilities. We are their capital's first and last line of defence.

**This is who and what we are.**

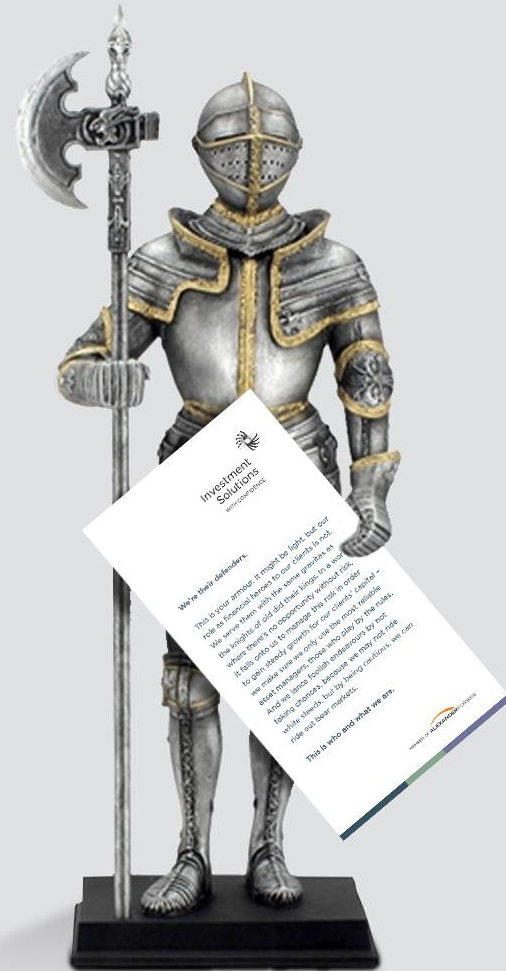
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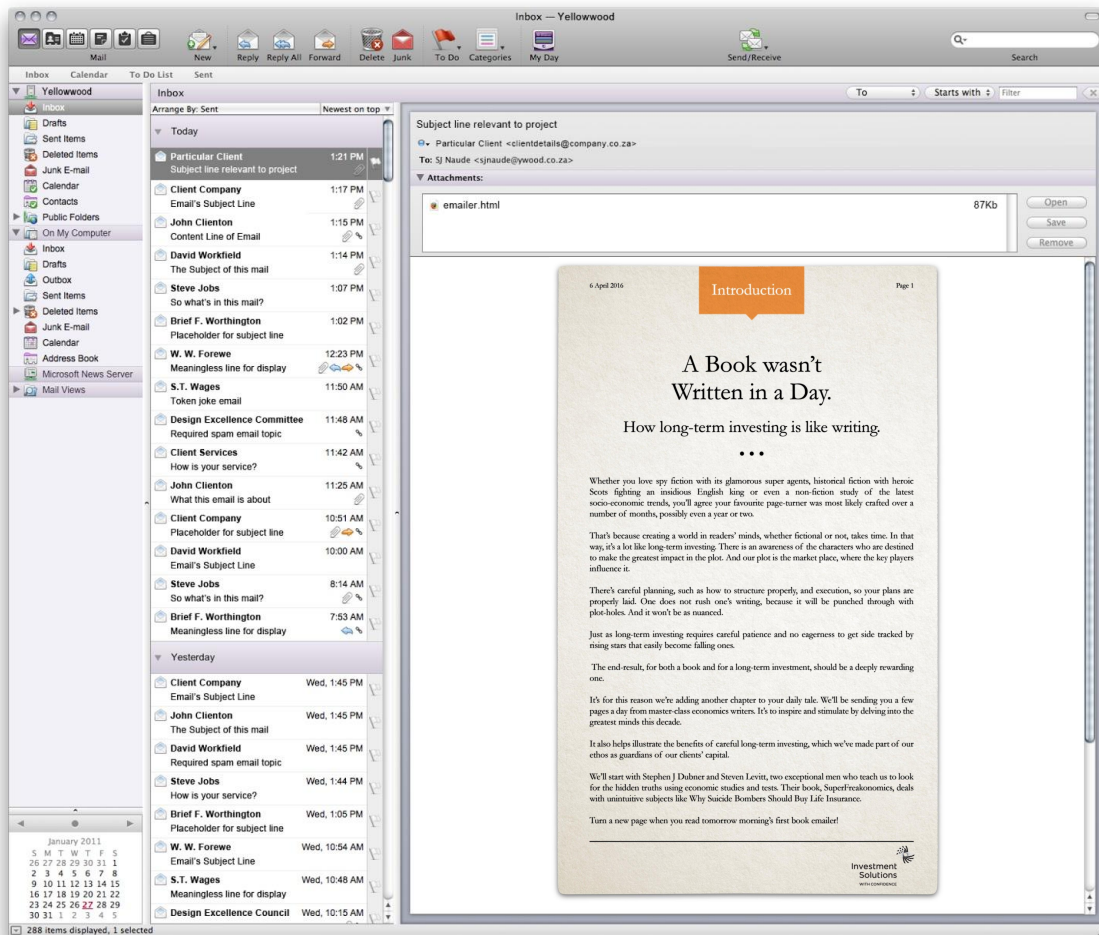
### We're their defenders.

This is your armour. It might be light, but our role as financial heroes to our clients is not. We serve them with the same gravitas as the knights of old did their kings. In a world where there's no opportunity without risk, it falls onto us to manage this risk in order to gain steady growth for our clients' capital – we make sure we only use the most reliable asset managers, those who play by the rules. And we lance foolish endeavours by not taking chances, because we may not ride white steeds, but by being cautious, we can ride out bear markets.

### This is who and what we are.



# EMAILER





# A Book wasn't Written in a Day.

How long-term investing is like writing.

• • •

Whether you love spy fiction with its glamorous super agents, historical fiction with heroic Scots fighting an insidious English king or even a non-fiction study of the latest socio-economic trends, you'll agree your favourite page-turner was most likely crafted over a number of months, possibly even a year or two.

That's because creating a world in readers' minds, whether fictional or not, takes time. In that way, it's a lot like long-term investing. There is an awareness of the characters who are destined to make the greatest impact in the plot. And our plot is the market place, where the key players influence it.

There's careful planning, such as how to structure properly, and execution, so your plans are properly laid. One does not rush one's writing, because it will be punched through with plot-holes. And it won't be as nuanced.

Just as long-term investing requires careful patience and no eagerness to get side tracked by rising stars that easily become falling ones.

The end-result, for both a book and for a long-term investment, should be a deeply rewarding one.

It's for this reason we're adding another chapter to your daily tale. We'll be sending you a few pages a day from master-class economics writers. It's to inspire and stimulate by delving into the greatest minds this decade.

It also helps illustrate the benefits of careful long-term investing, which we've made part of our ethos as guardians of our clients' capital.

We'll start with Stephen J Dubner and Steven Levitt, two exceptional men who teach us to look for the hidden truths using economic studies and tests. Their book, *Superfreakonomics*, deals with unintuitive subjects like Why Suicide Bombers Should Buy Life Insurance.

Turn a new page when you read tomorrow morning's first book emailer!



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EVERYONE WILL RECEIVE A COPY OF THE  
INDUCTION BOOK AND **NEW EMPLOYEES**  
WILL RECEIVE IT ON THEIR FIRST DAY AS AN  
INTRODUCTION TO THE CULTURE OF  
INVESTMENT SOLUTIONS.



# WE ARE THE GUARDIANS

MEMBER OF  ALEXANDERFORBES

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Solutions  
WITH CONFIDENCE





**We are the guardians of our  
client's hopes and dreams.**  
We protect against the stormy weather  
of the economy.  
We are the nurturers of nest eggs.  
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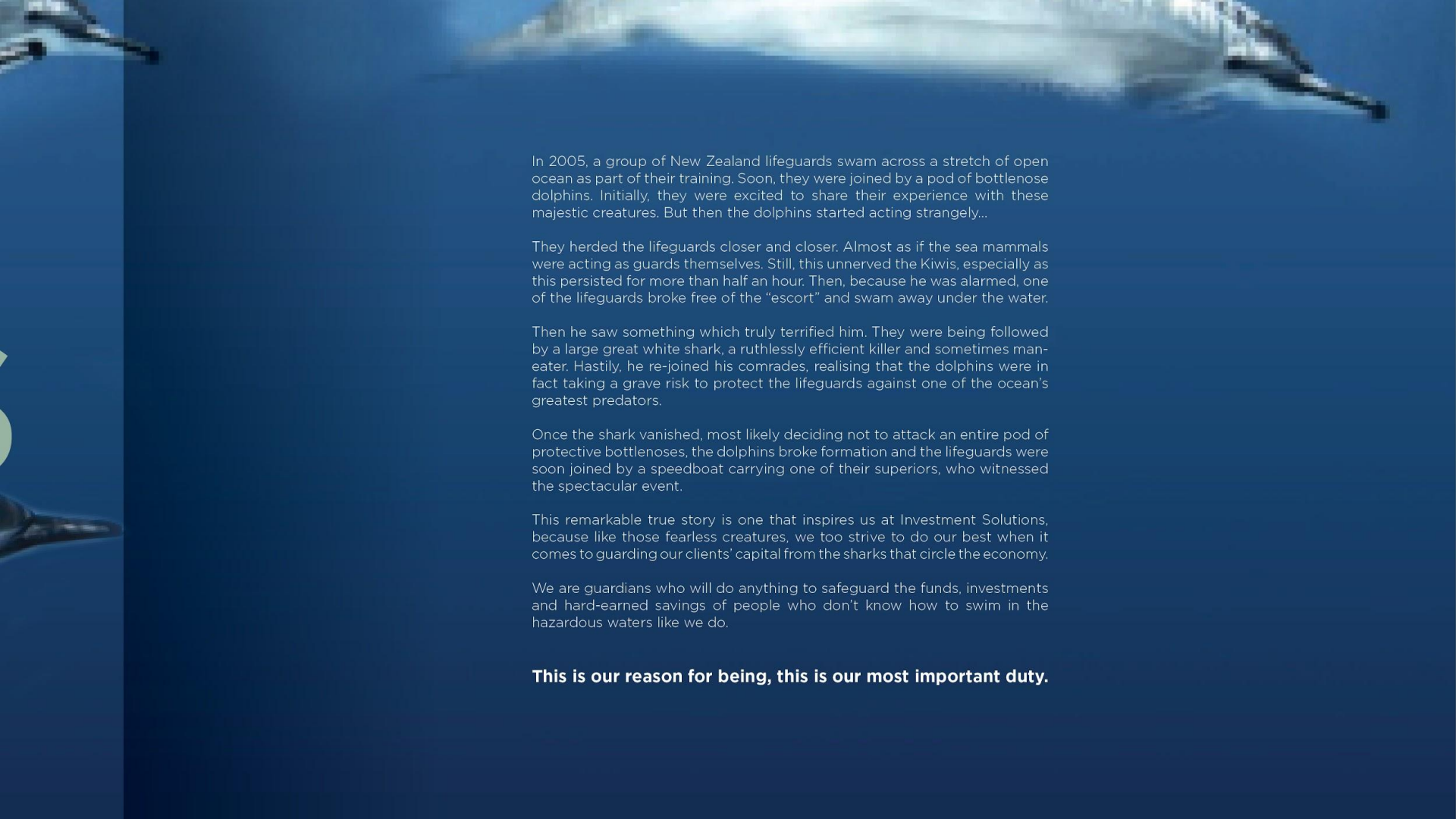




# NATURE'S GUARDIANS

In 2005, a group of four Zealand Mako sharks swam across a stretch of water nearly as long as the previous Guinness World Record for a shark. They were the first to be recorded swimming in a straight line for over 100 meters. This feat was a testament to the power and grace of these magnificent creatures. It was a reminder that the ocean is a vast and mysterious world, full of life and wonder. We must protect it, for it is our home.

There is a lot of talk about the importance of the ocean. But what does it mean to be a guardian of the ocean? It means to protect the life that lives in the water. It means to respect the power of the ocean. It means to be a part of the ocean. We are all guardians of the ocean. We all have a role to play. We all have a duty to protect the life that lives in the water. We all have a duty to respect the power of the ocean. We all have a duty to be a part of the ocean. This is our reason for being. This is our most important duty.



In 2005, a group of New Zealand lifeguards swam across a stretch of open ocean as part of their training. Soon, they were joined by a pod of bottlenose dolphins. Initially, they were excited to share their experience with these majestic creatures. But then the dolphins started acting strangely...

They herded the lifeguards closer and closer. Almost as if the sea mammals were acting as guards themselves. Still, this unnerved the Kiwis, especially as this persisted for more than half an hour. Then, because he was alarmed, one of the lifeguards broke free of the "escort" and swam away under the water.

Then he saw something which truly terrified him. They were being followed by a large great white shark, a ruthlessly efficient killer and sometimes man-eater. Hastily, he re-joined his comrades, realising that the dolphins were in fact taking a grave risk to protect the lifeguards against one of the ocean's greatest predators.

Once the shark vanished, most likely deciding not to attack an entire pod of protective bottlenoses, the dolphins broke formation and the lifeguards were soon joined by a speedboat carrying one of their superiors, who witnessed the spectacular event.

This remarkable true story is one that inspires us at Investment Solutions, because like those fearless creatures, we too strive to do our best when it comes to guarding our clients' capital from the sharks that circle the economy.

We are guardians who will do anything to safeguard the funds, investments and hard-earned savings of people who don't know how to swim in the hazardous waters like we do.

**This is our reason for being, this is our most important duty.**

# INTERNAL LAUNCH ACTIVATION



**THE LAUNCH ACTIVATION TAKES  
PLACE AT A COCO FORUM AND IS  
FOLLOWED BY A COCKTAIL FUNCTION.**

# ACTIVATION IDEA: THE SHAOLIN MONKS

**THE ULTIMATE INSPIRATION FOR  
GUARDIANSHIP IS A GROUP OF NOBLE  
MONKS WHO DEFENDED THEIR TEMPLE AND  
THEIR CHARGES FROM BANDITS  
AND PIRATES DECISIVELY...**

**THROUGH MASTERY OF THEIR  
OWN UNIQUE MARTIAL ARTS  
SYSTEM, SHAOLIN-STYLE KUNG FU.**

**THIS TRADITION STILL EXISTS TODAY.**



**THEY SHARE IMPORTANT QUALITIES  
WITH INVESTMENT SOLUTIONS, TOO:**

**THEY ARE HONOURABLE AND  
ABOVE REPROACH, MAKING THEM PERSONS  
OF INTEGRITY, JUST LIKE INVESTMENT  
SOLUTIONS.**



**THEY REMAIN COOL-HEADED IN FIERY  
SITUATIONS, JUST AS INVESTMENT  
SOLUTIONS DOES WHEN THERE'S TURMOIL  
IN THE MARKET.**

**AND FINALLY, THEIR IRON DISCIPLINE  
MAKES THEM EXTREMELY FOCUSED ON THE  
TASK AT HAND...**

**INVESTMENT SOLUTIONS HAS THE  
SAME DISCIPLINE, ESPECIALLY WHEN  
IT COMES TO MANAGING RISKS TO  
THEIR CLIENTS' CAPITAL.**

SO THE ACTIVATION IDEA FOR  
GUARDIANSHIP IS: WATCHING THE SHAOLIN  
MONKS DEMONSTRATE THEIR AMAZING AND  
SPECTACULAR ABILITIES... **LIVE.**

**THEY WILL BE IN JOHANNESBURG FROM 28  
JUNE - 10 JULY.**

**SO WITH A SHOW BOOKED OUT, THE ENTIRE  
INVESTMENT SOLUTIONS TEAM CAN GO AND  
SEE A HIGHLY-ENJOYABLE PHYSICAL  
DEMONSTRATION...**

**...OF WHAT INVESTMENT SOLUTIONS  
IS AT HEART: GUARDIANS.**

# FURTHER INGRAINING OUR PURPOSE

THE THEMES CONTAINED IN THE  
COAT OF ARMS ARE FURTHER EMBEDDED  
INTO THE DAILY SURROUNDINGS OF  
THE INVESTMENT SOLUTIONS OFFICES,  
CONSTANTLY REMINDING EMPLOYEES  
OF THEIR **ROLES AS GUARDIANS.**



# GUARDIANSHIP

# OFFICES

# GUARDIANSHIP



# GUARDIANSHIP





# GUARDIANSHIP



# BREAK AREA

# GUARDIANSHIP





# GUARDIANSHIP





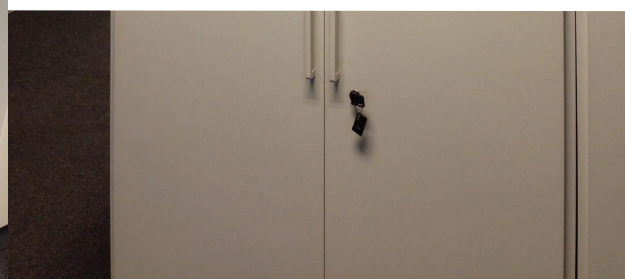
# COMFORT, CERTAINTY AND NURTURING

COMFORT,  
CERTAINTY &  
NURTURING



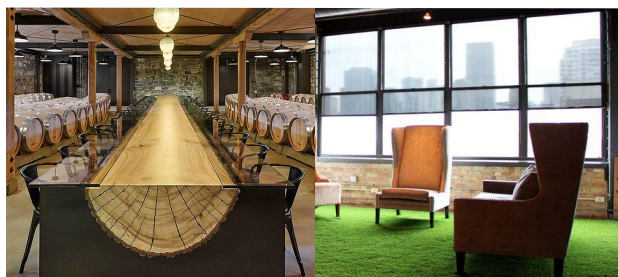
# GROWTH

GROWTH





GROWTH

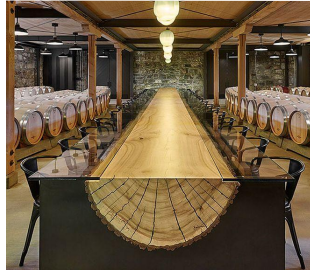


GROWTH





GROWTH



# GLOBAL CAPABILITY



# GLOBAL CAPABILITY



# GLOBAL CAPABILITY



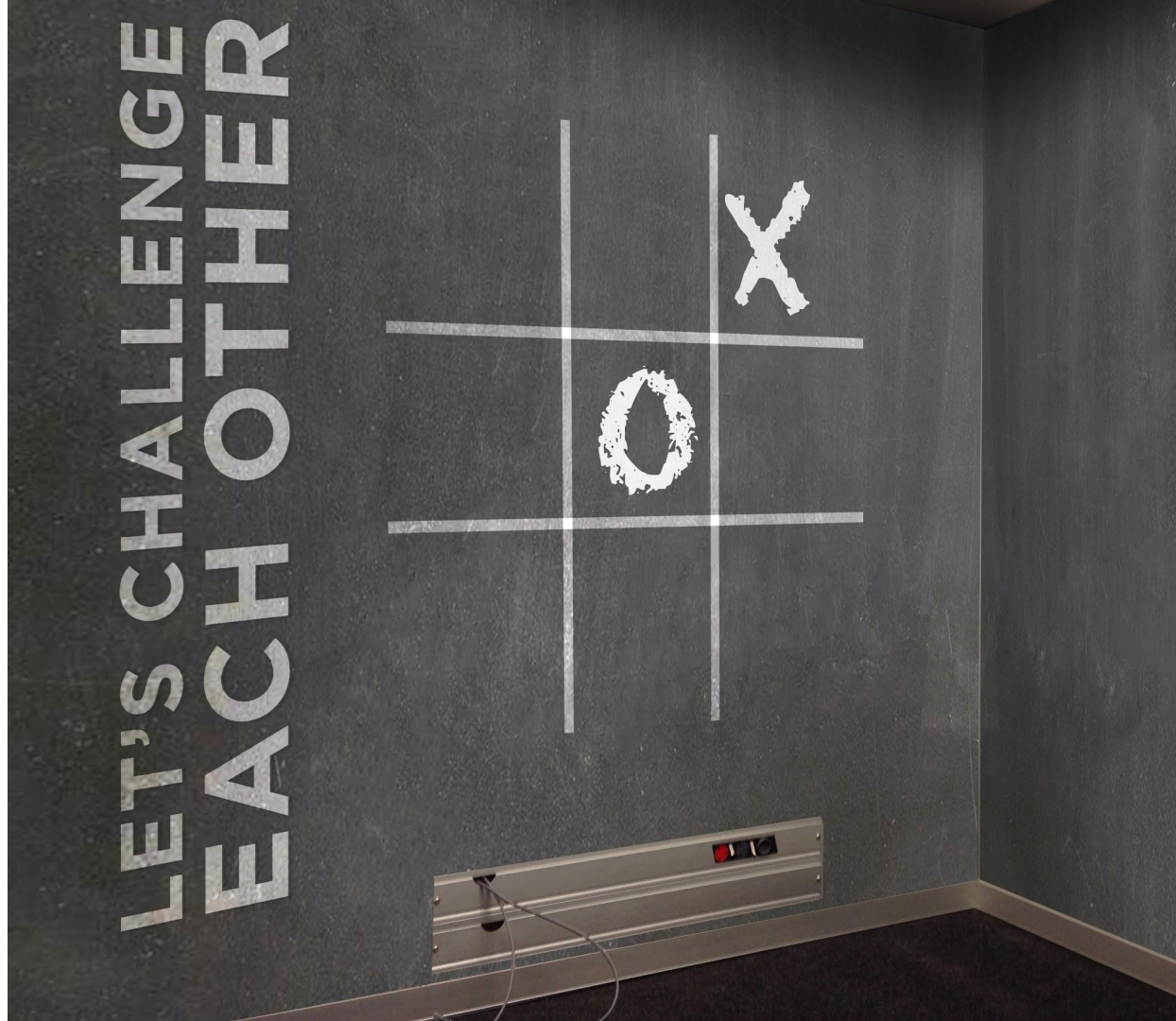
# MASTERY

MASTERY





MASTERY



MASTERY

CHALLENGE  
YOURSELF

5	3			7				
6			1	9	5			
	9	8					6	
8				6				3
4			8		3			1
7				2				6
	6					2	8	
			4	1	9			5
				8			7	9

# DIGITAL TOUCH-SCREEN WITH REAL-TIME STOCK MARKET VISUALISATION FEED.

**WE CREATE DATA VISUALISATION FROM STOCK MARKET FEEDS & INSTALL TOUCH-SCREENS IN PAUSE AREAS FOR PEOPLE TO INTERACT WITH. REAL-TIME ACTIVITIES ARE BROUGHT TO LIFE & SERVE AS A CONSTANT REMINDER THAT WE ARE “GUARDIANS OF YOUR CAPITAL”.**









## 2. AF IS - EXTERNAL CAMPAIGN

# PAY-OFF LINE

**“ARE YOU GUYS PURPOSEFULLY  
SHYING AWAY FROM ‘GUARDIAN’  
AND IF SO WHY?”**

**ONLY ONCE YOU'VE CONSIDERED  
THE RISKS, CAN YOU PLAN A MORE CERTAIN  
FUTURE.**

WITH REFERENCE TO **GUARDIAN**  
IN THE BODY COPY.





## WHAT'S THE WORST THAT COULD HAPPEN?

**A global financial crisis.** Combine Americans looking for their first home with unscrupulous lending practices. It was inevitable for the housing bubble to pop, which it did in 2008. Houses were foreclosed, banks lost money and the rest of the world's markets were hit hard by the financial crisis.

Even when a bear market comes knocking on the door, we've prepared for it, because we've built our investment portfolios to withstand the worst. This is done by diversifying risk and weighing up opportunities versus threats. While opportunity can't exist without risk, we navigate these uncertain times with focus and acumen to consistently deliver solid risk-adjusted returns for our clients. Guarding their capital not like a home, but a castle.

Only once you've considered the risks, can you plan a more certain future.



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# WHAT'S THE WORST THAT COULD HAPPEN?

**Global extinction.** Entire hives of honey bees are dying in huge numbers. This is worrying because plant-life and honey bees have had a mutualistic relationship for millions of years - both requiring each other to survive. The agricultural industry is at the mercy of bees and their fate because without them, the consequences to the agricultural industry would be dire. As well as to the markets, and possibly even all life on Earth.

Only once you've considered the risks, can you plan a more certain future.



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# OUTDOOR



## DREAM HOME PURCHASE OR PROMOTER OF ECONOMIC **CATASTROPHE?**

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can you plan a more certain future.

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# HARMLESS HONEY BEE OR CATALYST FOR GLOBAL **EXTINCTION?**

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## SIMPLE SPRAY CAN OR **CONTRIBUTOR TO GLOBAL WARMING?**

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WHAT'S THE  
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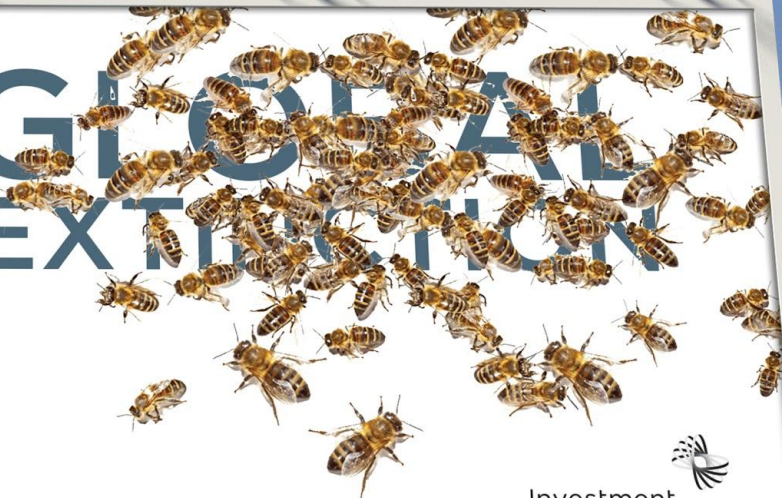


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WHAT'S THE  
**WORST**  
THAT COULD  
HAPPEN?

**GLOBAL  
EXTINCTION**



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WHAT'S THE  
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# GLOBAL EXTINCTION

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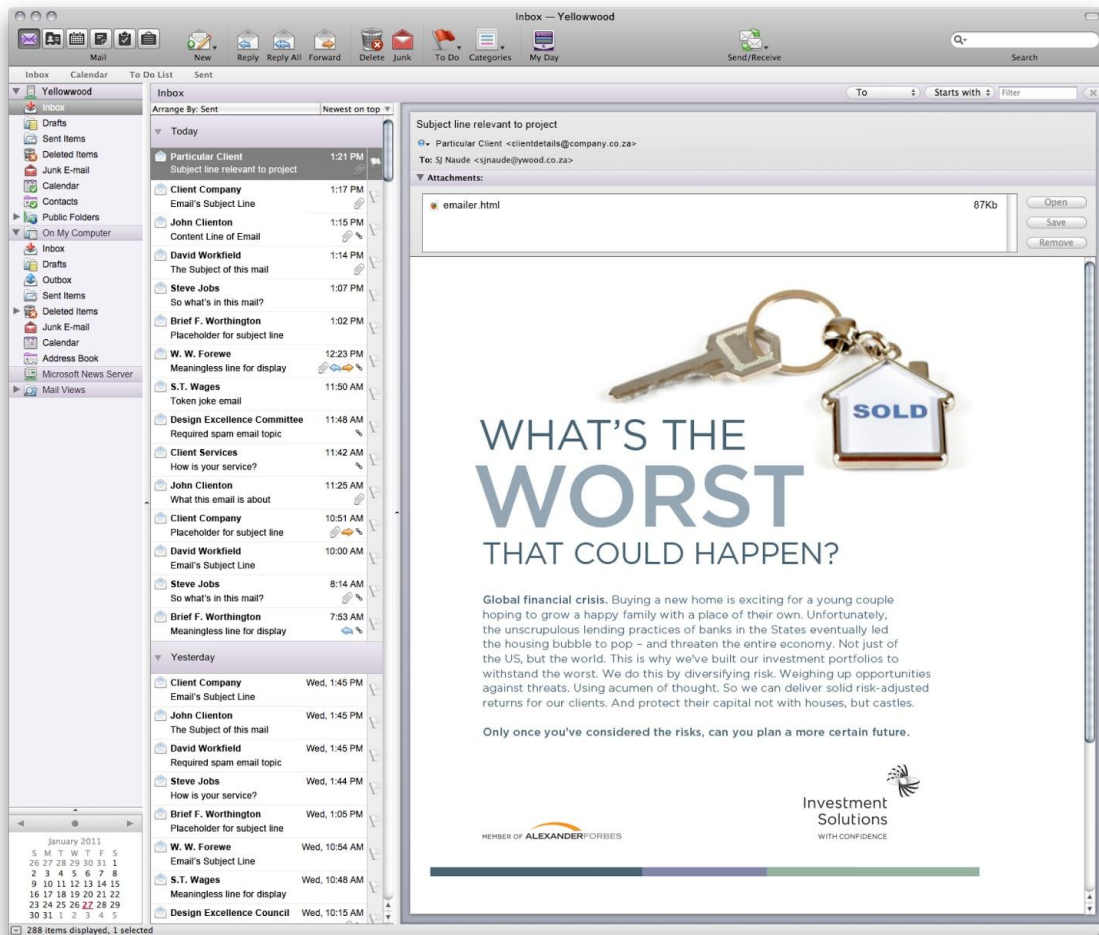
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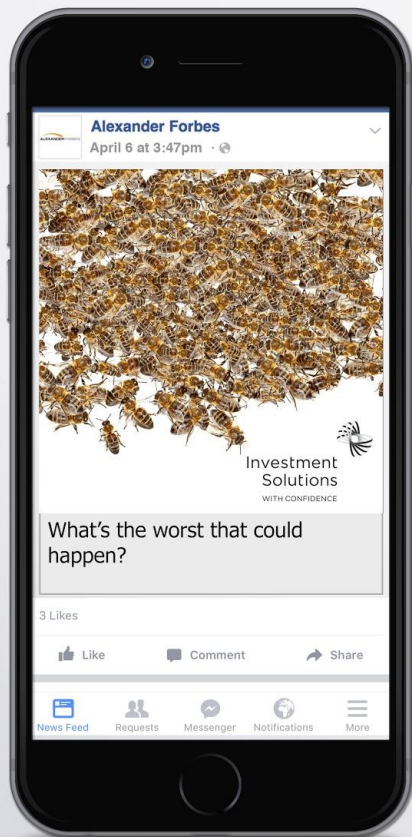
# MAILER TO CLIENTS AND BROKERS







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## FEATURES

Banks won't finance  
large-scale residential  
developments



## FEATURES

Zuma failed to uphold  
constitution; treasury  
to determine costs



## FM FOX

Nominations open for  
Financial Mail: Little  
Black Book 2016



**Bruce's List:** A daily  
guide to informed reads  
Peter Bruce lists the crucial reads  
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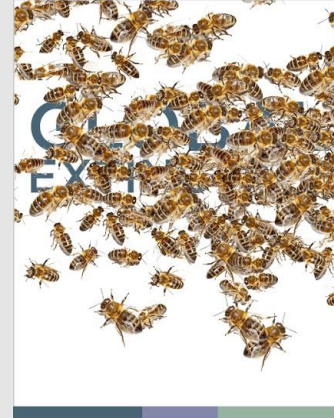
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