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## Introduction

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### **Your brand is your truth.**

Properly defined, it evokes your values as an organization and demonstrates the promise you make at every audience touch point.

### **Your brand is your story.**

Carefully crafted, it takes your audience on a journey that allows them to discover who you are and exactly what it is that makes you special.

### **Your brand is your foundation.**

Strategically designed, your brand provides the framework for decision-making. It guides the content, structure and appearance of all your communications so that your story is told consistently in a manner that is both honest and reliable.

### **A strong brand has incredible power.**

It redefines the competitive landscape, connects with prospects, creates memorable experiences, builds lasting relationships, and helps leaders better manage people, resources, and profits. The benefits include:

- Adds value to a company
- Leads to increased perceptions of quality, trust, and reliability
- Builds trust to ensure lasting customer relationships
- Aids recognition in a cluttered marketplace
- Has the ability to command a premium price

## The Impact of Branding

- An increase of customer loyalty of just 2% is equivalent to a 10% reduction in costs.
- An increase of 5% in customer loyalty can deliver 95% greater profitability over the lifetime of that customer.
- Over 50% of customers would be willing to pay a 20 to 25% price premium to the brand that they are most loyal to before they would switch to a competitive brand.
- 50% of your customers are willing to try a new product from a preferred brand because of the implied endorsement, credibility, and trust.
- It takes seven times the cost and effort to gain a new customer as it does to keep an existing customer.

# Building The Brand



## Brand Positioning & Personality

### Defining the Banyan Wealth Brand Archetypes

### Archetypal Branding

Successful brands have a strong sense of identity and understand their stature in the marketplace. They have values and an identity that mirrors the hopes and aspirations of their prospects and customers. After all, brands are a lot like people. It's only natural that companies have begun to use some of the same techniques we use for defining ourselves to define themselves.

Whether from the mind of Shakespeare, Poe, Whitman or Hemingway, characters with varying and unique traits have captured our imaginations and inspired an emotional response. Throughout history, the same can be said about companies as they take on the very same qualities and incite the very same emotions from your most memorable characters. Through this identification, it makes it easier for a customer to know your company's story and what role you will play in their life.

The term "archetype," as used in marketing and advertising, is based on Carl Jung's theory that humans have an innate tendency to use symbolism to understand concepts and that the subconscious plays a role in deciding which marketing messages we retain. Archetypal images are characters that represent deeply fundamental human needs and desires, and have often been used by the advertising industry to subtly persuade consumers to purchase their products or services. Identifying those archetypes that symbolize your brand is critical to understanding your positioning, differentiating your brand, and most critical, connecting with your audience. Your brand archetypes will also be influential in crafting the appropriate messaging and communications to your customers and provide a consistent and clear internal and external voice.

**Muse has found that archetypes are helpful in guiding a company's brand story and telling it in an easy and compelling manner. Banyan Wealth's brand archetypes will serve as a foundation for your comprehensive verbal and visual brand approach and a guide in mapping your brand vision and corporate legacy.**

A symbol, theme, setting, or character-type that recurs in different times and places in myth, literature, folklore, dreams, and rituals so frequently or prominently as to suggest (to certain speculative psychologists and critics) that it embodies some essential element of 'universal' human experience.

The Concise Oxford Dictionary of Literary Terms

[ÄR'-Kİ'TİP']

## The 12 Brand Archetypes

There are 12 classic archetypes. They cover the full brand identity spectrum, from those that convey comfort to others to those that create excitement. The Banyan Wealth brand archetypes are identified by displaying in all capital letters.

### INNOCENT

Goal: To be happy

Traits: Strives to be good, is pure, young, optimistic, simple, moral, romantic, loyal

Drawback: Could be naive or boring

Marketing niche: Companies with strong values, seen as trustworthy, reliable and honest, associated with morality, good virtues, simplicity, can be nostalgic

Example: Dove soap, Coca-Cola, Cottonelle bathroom tissue

### Every Person

Goal: To belong, or connect with others

Traits: Down to earth, supportive, faithful, folksy, person next door, connects with others

Drawback: Could lack a distinctive identity and blend in too much

Marketing niche: Common touch, solid virtues, gives a sense of belonging

Example: Home Depot, eBay

### Hero

Goal: Help to improve the world

Traits: Courageous, bold, honorable, strong, confident, inspirational

Drawback: Could be arrogant or aloof

Marketing niche: Make a positive mark on the world, solve major problems or enable/inspire others to do so

Example: Nike, BMW, Duracell

### Outlaw/Rebel

Goal: Break the rules and fight authority

Traits: Rebellious, iconoclastic, wild, paving the way for change

Drawback: Could take it too far and be seen in a negative way

Marketing niche: Agent of change, advocate for the disenfranchised, allow people to vent or break with conventions

Example: Harley-Davidson, Virgin (Richard Branson)

### Explorer

Goal: Finds fulfillment through discovery and new experiences

Traits: Restless, adventurous, ambitious, individualistic, independent, pioneering

Drawback: Might not fit into the mainstream

Marketing niche: Exciting, risk-taking, authentic

Example: Indiana Jones, Jeep, Red Bull

### Creator

Goal: Create something with meaning and enduring value

Traits: Creative, imaginative, artistic, inventive, entrepreneur, non-conformist

Drawback: Could be perfectionistic or impractical

Marketing niche: Visionary, help customers express or create, and foster their imagination

Example: Lego, Crayola

### Ruler

Goal: Control, create order from chaos

Traits: Leader, responsible, organized, role model, administrator

Drawback: Could lack a common connection, or be too authoritative or controlling

Marketing niche: Help people become more organized, restore order, create more stability and security in a chaotic world

Example: Microsoft, Barclays, Mercedes-Benz

### Magician

Goal: Make dreams come true, create something special

Traits: Visionary, charismatic, imaginative, idealistic, spiritual

Drawback: Could take risks that lead to bad outcomes

Marketing niche: Help people transform their world, inspire change, expand consciousness

Example: Disney, Wizard of Oz, Apple

### Lover

Goal: Create intimacy, inspire love

Traits: Passionate, sensual, intimate, romantic, warm, committed, idealistic

Drawback: Could be too selfless or not grounded enough

Marketing niche: Help people feel appreciated, belong, connect, enjoy intimacy, build relationships

Example: Victoria's Secret, Godiva Chocolate, Marie Claire

### CAREGIVER

Goal: To care for and protect others

Traits: Caring, maternal, nurturing, selfless, generous, compassionate

Drawback: Being taken advantage of, taken for granted, or exploited

Marketing niche: Help people care for themselves, serve the public through health care, education or aid programs

Example: Mother Theresa, Campbell's Soup, Johnson & Johnson, Heinz

### Jester

Goal: To bring joy to the world

Traits: Fun, sense of humor, light-hearted, mischievous, irreverent

Drawback: Could be seen as frivolous or disrespectful

Marketing niche: Help people have a good time or enjoy what they are doing, allow people to be more impulsive and spontaneous

Example: Motley Fool, Ben & Jerry's, IKEA

### SAGE

Goal: To help the world gain wisdom and insight

Traits: Knowledgeable, trusted source of information, wisdom and intelligence, thoughtful, analytical, mentor, guru, advisor

Drawback: Could be overly contemplative or too opinionated

Marketing niche: Help people to better understand the world, provide practical information and analysis

Example: BBC, PBS, Google, Philips

Based upon workshops, discussions and internal surveying, Banyan Wealth is comprised of three essential brand archetypes. Accompanying each archetype is a supporting customer value statement.

## Primary Archetype: Innocent

Voice: Honest, optimistic, uncompromised by big firm products or agendas

Client Impact: Hopeful, trusting and peace-of-mind



## Innocent Narrative

We understand that planning for the future can be complex and stressful. For our clients, it represents their financial legacy and a journey representing their dreams, ambitions and a vision of a better tomorrow. It means doing everything possible to remove the stress from managing their financial future. Transforming what looks to be difficult to simple and understandable. What looks to be impossible to realistic and sustainable. Empowering our clients and families with the opportunity to live the life they love today while maintaining a realistic path to the tomorrow of their dreams. For all of us at Banyan Wealth, it means staying true to our values and maintaining an approach founded on honesty and trust. Delivering a calming confidence and understanding that no matter life's unique challenges and transitions, our client's future and their "why" is well protected. Working hand-in-hand with each to achieve something greater than just wealth – family, health and enjoying life to its absolute fullest.

## Goal

To be happy

## Strategy

To do things right

## Fear

To be punished for doing something bad or wrong

## Secondary Archetype: Sage

Voice: Experienced, forward-thinking and educating  
Client Impact: Clarity, knowledge that provides protection and “living”



### Sage Narrative

Protecting our client’s financial future is much more than planning. It’s about delivering an unparalleled level of service and care that’s supported by the industry’s best financial expertise. At the core of this expertise is an insatiable passion for knowledge and teaching others. Carefully listening to our clients and clearly understanding their “why.” Providing each client and their families with the calm and peace of mind that their financial today and tomorrow are well protected. Translating our experience, expertise and knowledge into performance and results with one focus in mind – helping our clients achieve their dreams and live the life they love.

### Goal

To use intelligence and analysis to understand the world

### Strategy

Seeking out information and knowledge; self-reflection and understanding thought processes

### Fear

Being duped, misled-or ignorance

## Secondary Archetype: Caregiver

Voice: Calm, reassuring, thoughtful and comforting

Client Impact: Sense of safety and security, safe harbor, being understood



## Caregiver Narrative

We understand the important role we play in our client's lives and the confidence they place in us on a daily basis. Ultimately, all that matters most is our clients and helping to protect those that matter most in their lives. Establishing a family-like trust and calming reassurance that we'll be there along their life's journey, focusing on their financial wellbeing so they can enjoy life with the understanding their vision of tomorrow is always within reach. It's a care philosophy that's embedded in our culture and tradition and drives our customer promise and brand values.

## Goal

To help others

## Strategy

Doing things for others

## Fear

Selfishness and ingratitude

## Brand Values

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Brand Values are your brand's organizing principles derived from your archetype makeup. They ground your brand and provide guidance in the face of adversity. Values serve to define your organization and guide the behavior of all who represent it. Strong values – lived within the organization – drive the brand experience outside the organization, and it is critical that everyone associated with the Banyan Wealth brand has a clear understanding of what the values are and how to uphold them.

### **Discipline**

Consistency and proven processes drive success and sustainability.

### **Education**

We have a passion for learning, understanding and delivering transparency in everything we do.

### **Persistence**

Great isn't good enough; we never rest on our laurels.

### **Compassion & Humility**

We're always humble and grateful for the opportunity to play a role in our clients' lives.

### **Vision**

We pride ourselves on providing forward-thinking leadership and innovative solutions, supported by the industry's best tools and resources.

## Brand Story

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### The Banyan Wealth Story

#### **Behind every successful company lies an authentically remarkable story.**

Since our launch in 2001, our top priority remains to this day to provide our clients the very best in financial care and expertise, supported by the industry's best and most innovative tools. We were founded on a vision of a more personal and intimate wealth management and financial planning experience; one that wasn't clouded in overly complex terms and investment ambiguities, but one with a simple and clear commitment to empowering our clients with the experience, solutions and knowledge to live the life they love. In 2019, we decided it was time to create an enhanced corporate image that was authentic to this approach and externally represented the internal values that have established us as one of the nation's leading wealth management and financial planning companies.

To help us in this important endeavor, we partnered with a leading marketing firm on a journey to discover and create a new brand identity. It was important to us that we create an authentic message and visual footprint that precisely aligned with our organization's culture and the passion that has driven us since our inception. The process was intensive and grounded in science-based learnings about our company's culture and values. It included nine months of insightful discussions, industry research and important self-reflection, all driven by a comprehensive employee survey that served as the foundation of our new brand identity.

We're excited to share the Banyan Wealth brand story.



### Why Banyan?

#### Reinforcing the Relationship of Family, Health and Our Client's Financial Well-Being

As our client's trusted financial partner, we understand that the true meaning of wealth isn't about purchasing the new home or latest car. It's about living life to the fullest and protecting what matters most in life – their family and ensuring the health and happiness of those they love. With this in mind, Nick Sergio, Banyan Wealth's Founder and Chief Investment Officer, sought a new name and corporate identity that uniquely represented this mission and the organizational values that have fueled the firm's success for over 20 years. The new name needed to demonstrate the importance of family from both Nick's personal perspective and that of the firm's clients.

## Brand Story

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The word “Banyan” was a natural fit. In addition to being strongly symbolic of the firm’s values, five of the six letters of the word represent the first names of his family. Lastly, the “y” represents the firm’s philosophy of helping clients discover their “why” and building a personal financial plan that delivers the financial security to ensure their families are always well protected.

### Banyan Tree Symbolism

Across the world, the Banyan tree carries important symbolic meanings. Lore has it, if you see the tree, it’s a sign of growth and lifelong happiness. In some cultures, it’s viewed as a place where people meet to discuss serious matters and enjoy one another’s company. The Banyan Tree also represents knowledge, wisdom, enlightenment, strength, “fulfillment of wishes,” family, good health and wealth – all represented across Banyan Wealth’s core values and cultural attributes.

### The Story Behind the Banyan Wealth Logo and Color

Banyan Wealth’s distinctive logo and color was developed to further reinforce the company’s culture and client-centric wealth management and financial planning approach. The logo icon was purposely developed in a circular design as the shape represents community, friendship, relationships, stability, commitment and unity.

Within the circle, a banyan tree is visible with five distinct portions. Each portion represents Banyan Wealth’s corporate values of Education, Compassion & Humility, Vision, Discipline and Persistence. The color green evokes clarity of mind and the balancing of emotions – two critical components of a successful financial well-being. The lighter shade of green represents freshness and growth while the darker shade relates to prestige and wealth.

## Brand Voice and Tone

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Your Brand Voice is how you communicate with your audience. The personality of the Banyan Wealth brand is determined in large measure by the words you use and the sentences you write. It comes through in advertising, web communications, brochures, emails and other communication channels. It shapes every communication across all audience segments, both internal and external. Maintaining a consistent voice and tone is essential to promoting consistency and upholding Banyan Wealth brand's attributes.

While Brand Voice serves as the character and personality of your organization and culture, Brand Tone acts as the expression of your brand character to your targeted audience. Unlike your voice, it must change to be relevant and appeal to your audience. For instance, your social media content may carry a more informal tone while your website content may allow for more grammatical complexity. A brand's tone is not just the type of language you use, but the length of your sentences, the way the language flows and the rhythm and pace of your content. As with all your branding, consistency is the key to developing a believable and credible brand.

**voice =** how we sound

**personality =** what we're like

**content =** the message

**tone =** variation in voice  
based on audience  
and medium

## Brand Voice and Tone

The below table demonstrates the relationship of brand character/persona, tone, language and purpose play in defining the Banyan Wealth Brand Voice.



Tone guidelines are hard to holistically define because they're entirely driven by context. On the pages to follow are voice authenticity guidelines to assist in stating a consistent brand tone in your marketing and corporate communications.

## Voice Authenticity

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### Expressing a Knowledgeable Tone

Knowledge and intelligence is portrayed in the voice by utilizing language that is geared towards an educated audience. But remember, simplicity is also key.



- Be authoritative but not complicated. While verbiage should not be overly complex or complicated, it should demonstrate your breadth of knowledge and understanding.
- Industry-specific words and jargon should be briefly explained to both demonstrate mastery of the concept and educate your clients.
- Avoid conveying a tone that is condescending, elitist or assuming, in addition to sentences that are verbose or heavy on jargon.

### Expressing a Straight-Forward Tone

A simple and straight-forward tone is critical to your success. It's best expressed by being direct and transparent with your clients, creating a feeling of trust, honesty and mutual understanding. Authenticity is key.



- This attribute should strike a balance with intelligence, meaning the tone should avoid any level of condescension and the language should be direct and understandable.
- Your clients recognize truth and authenticity. Tell them the truth without unnecessary words. Use short form prose – say it concisely and with emotion, but with less.
- Simplicity, easy readability and avoidance of jargon should be strong considerations as your approachability factor is a key differentiator from similar firms that often appear lofty, superior and elitist.
- Written as if you're speaking to a friend but don't compromise the intellectual value.

## Voice Authenticity

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### Expressing a Friendly & Caring Tone

Friendliness and caring can best be portrayed through an upbeat and positive tone of voice that is inviting, open, compassionate and accessible.

- Toning down the overly professional and jargon-based language that is often portrayed in our competitors' brand voices is another way of demonstrating friendliness.
- A conversational tone should also be adopted, so as to avoid being tight, firm or terse.
- Making authentic connections with your clients is a priority. Your language should reflect this people-oriented, thoughtful approach.
- Reinforce positive outcomes and communicate with empathy.
- Avoid uppercase letters and exclamation points.



### Expressing a Responsive Tone

At the core of your responsiveness is a focus on providing clients with a committed team that is inspirational, passionate, addresses their unique needs and does what it takes to get the job done.

- This quality is conveyed in the voice by creating content that speaks to your pro-activeness and assures clients of your transparency, vision, commitment and passion for getting results.
- You believe in the power of new ideas and will work tirelessly to turn them into actions. Visionary ideas and solutions should be shared in a relatable and approachable way using language that is inspirational, positive, as well as genuine.



## Voice Authenticity

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### Expressing an Optimistic Tone

Optimism is conveyed in your voice by utilizing language that is positive, inspiring and reassures clients that you have the solutions to the challenges they face.



- Use of positive language versus negative.
- Problems are conveyed as opportunities and setbacks are learning experiences.
- Focus on the benefits of your products and services rather than the features.
- Financial planning is serious and complex. Strike a positive tone that focuses on impact, presents complex ideas in simple language, and celebrates successes.



## Mission Statement

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Mission statements may seem overused and unimportant in the scheme of things, but a well-crafted one can help you focus your business. It can give you a framework for evaluating opportunities and deciding whether they fit your core business model and strategy. It can help you define your business and establish your brand, and it can help your employees focus their efforts and suggest ideas that fit with what you're trying to do. Most importantly, it serves as or supports your customer promise.

The following mission statement was developed with respect to Banyan Wealth's archetypal branding and brand values.



Sage



Caregiver



Innocent

## Our Mission

To empower our clients with the expertise, care and confidence to live the life they love both today and tomorrow.

## Tagline and Tagline Objective

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Second only to your logo, your tagline is one of the most important elements in communicating the Banyan Wealth brand. It is a statement that will frequently appear with the Banyan Wealth logo in your communications. Like the logo, it has to say a lot very quickly. Your tagline acts as both an introduction and a summary. Often, it will be stated alone. Sometimes, it will act as a conclusion to drive a meaningful and powerful closing note.

### Tagline

*Live the life you love.*

### Tagline Narrative

Banyan Wealth's tagline was created to demonstrate the company's unwavering commitment to helping clients succeed both today and tomorrow. Through our broad experience, wide-ranging expertise and industry-leading financial solutions, we're able to deliver our clients the financial confidence that saving for the future doesn't necessarily mean compromising the present. Our tagline symbolizes our understanding that the service and care we provide represents their financial legacy and a journey that includes their dreams, ambitions and a vision of a better tomorrow. As their trusted advisor and fiduciary, it means doing everything possible to remove the stress from managing their financial future. Transforming what looks to be difficult to simple and understandable. What looks to be impossible to realistic and sustainable. Empowering our clients and families with the opportunity to live the life they love today while maintaining a realistic path to the tomorrow of their dreams. For all of us at Banyan Wealth, it means staying true to our values and maintaining an approach founded on honesty and trust. Delivering a calming confidence and understanding that no matter life's unique challenges and transitions, our client's future and their "why" is well protected. Working hand-in-hand with each to achieve something greater than just wealth – family, health and enjoying life to its absolute fullest.

## Corporate Boilerplate

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Many times in our marketing communication programs, copy in the form of an “About Us” statement is required to informatively highlight your experience, expertise and product/service offerings. Use this specific paragraph as the closing text for any Banyan Wealth’s press release, brochure, or any place where you need to describe your corporate purpose.

### About Banyan Wealth

who you are

what you deliver

Banyan Wealth is a premier wealth management and financial planning company. Established in 2001 with offices in Red Bank and Toms River, New Jersey, and Suffern, New York, the team offers a comprehensive suite of personalized services for families and individuals, retirees, business owners, women investors, corporate executives and healthcare professionals. Visit [BanyanWealth.com](http://BanyanWealth.com) to learn more about their “Live the Life You Love” approach to managing your financial future.

how you deliver

call-to-action

# Applying The Brand



## Our Logo

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The Banyan Wealth logo is a specially designed and should be used in all applications.

### Full Version

The full version of the logo comprises three elements:

- The icon of the tree with five leaves
- The logotype design: “Banyan Wealth”
- The descriptor “Wealth Management & Financial Planning” or tagline “Love the life you live.”



### Color Variations of Full Logo with Tagline



## Our Logo

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### Color Variations of Full Logo with Descriptor



### Logo without Tagline or Descriptor

The logo can be used with or without the descriptor or tagline, however the logo elements should never be rearranged, nor should the provided electronic format be altered.



## Our Logo

### Banyan Wealth in Text

In text, Banyan Wealth should appear in initial caps – with a capital B and W.

### Area of Isolation

A minimum amount of clear space should always be maintained around Banyan Wealth’s signature to ensure optimum legibility and give it room to “breathe.”

The area of isolation is based on the height of the letter “y” in the logo, relative to the logo’s placed size.

The only exception from this rule is when the logo is used at the top of a layout and in conjunction with the photography blend.



### Size Requirements

The absolute minimum width of the logo, as shown to the left, is 1.5 inches (200 pixels for website usage). Reproducing the logo in a smaller size will jeopardize readability. At the smallest size, refrain from using the locked-up tagline. It may be used elsewhere at a readable size, but no larger than half the size of the entire logo.

The preferred size of the logo for the majority of Banyan Wealth’s marketing materials is 2.5 inches (350 pixels for website usage).



## Our Logo

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### Logo Usage Requirements

- A. It is strongly preferred that the Banyan Wealth logo be used against a white background. The logo can be reversed out of dark color for special occasions. Avoid using the logo on a photographic background, an overly complex background texture or a colored background that provides inadequate contrast.
- B. Type, imagery or other graphic elements may not overlap or interfere with the Banyan Wealth logo in any way.
- C. The Banyan Wealth logo must be used as flat artwork only. No animating, morphing, three-dimensional effects or other manipulation of the logo is permitted without approval. Do not alter, modify, recreate or scan Banyan Wealth artwork. Always use original camera-ready or electronic artwork as it is provided.
- D. The Banyan Wealth logo should always be reproduced in 2-color or in black-and-white. Color integrity in reproduction is important. Always match color swatches when printing or reproducing the logo.

### Legal Requirements

All originally created materials containing Banyan Wealth logo or name must be submitted for approval. For approval procedures, please contact:

Banyan Wealth  
Nicholas Sergio, AIF®  
11 Wharf Avenue, C-2  
Red Bank, NJ 07701  
Phone: 732-747-8540  
BanyanWealth.com  
Nick.Sergio@RaymondJames.com

## Our Logo

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### Incorrect Usage

The integrity of Banyan Wealth's logo is important. The visual examples on this page demonstrate incorrect usage. Any modification of the logo confuses its meaning and diminishes its visual impact.



Do not scale disproportionately or distort the logo.



Do not change the colors.



Do not add effects to the logo.



Do not place the logo on a busy background.



Do not place the logo on a photographic background.



Do not place the logo in a box.



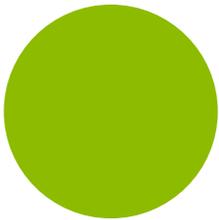
Do not link words to the logo.

## Color Palette

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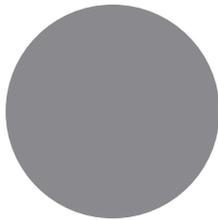
Color is an important, impactful means of visual identification. The primary brand colors of Banyan Wealth are green and gray. Consistent use of these colors will build recognition of Banyan Wealth, its brand and personality.

### Primary Color Palette



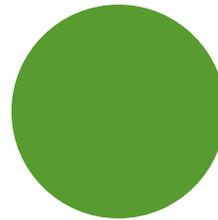
#### Vivid Green

PMS: 376C  
 CMYK: 56/3/100/0  
 RGB: 114/180/57  
 HEX: 72B439



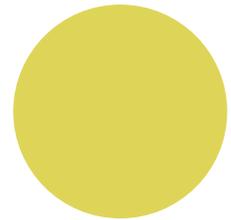
#### Calming Gray

PMS: Cool Gray 8  
 CMYK: 50/40/38/4  
 RGB: 124/126/130  
 HEX: 7C7E82



#### Consistent Green

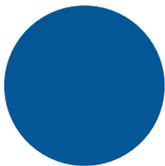
PMS: 362C  
 CMYK: 75/15/100/2  
 RGB: 66/147/61  
 HEX: 42933D



#### Innovative Yellow

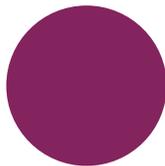
PMS: 584C  
 CMYK: 20/5/83/0  
 RGB: 205/207/74  
 HEX: CDCF4A

### Secondary Color Palette



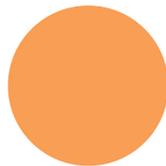
#### Cornflower Blue

PMS: 7685C  
 CMYK: 94/73/11/1  
 RGB: 32/76/141  
 HEX: 204C8D



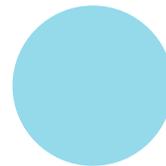
#### Byzantium

PMS: 7421C  
 CMYK: 48/99/34/16  
 RGB: 119/31/85  
 HEX: 771F55



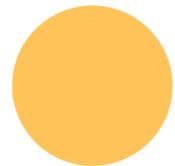
#### Saffron

PMS: 157C  
 CMYK: 4/43/76/0  
 RGB: 237/149/74  
 HEX: ED954A



#### Powder Blue

PMS: 304C  
 CMYK: 38/0/7/0  
 RGB: 138/212/230  
 HEX: 8AD4E6



#### Golden Yellow

PMS: 7617C  
 CMYK: 1/23/76/0  
 RGB: 251/190/77  
 HEX: FBBE4D

# Typography

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## Primary Typeface

Our primary typography, ITC Franklin Gothic Std, reinforces our identity as approachable, solid and straightforward.

ITC Franklin Gothic Std  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
01234567890!"\$%&?()=

*ITC Franklin Gothic Std Oblique*  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
01234567890!"\$%&?()=

ITC Franklin Gothic Std Medium  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
01234567890!"\$%&?()=

*ITC Franklin Gothic Std Medium Oblique*  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
01234567890!"\$%&?()=

## Secondary Typeface

Our secondary typography for presentations and online materials is Calibri.

Calibri Regular  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
01234567890!"\$%&?()=

*Calibri Italic*  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
01234567890!"\$%&?()=

**Calibri Bold**  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
01234567890!"\$%&?()=

***Calibri Bold Italic***  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
01234567890!"\$%&?()=

## Photography

### Standard

The application of an enhanced brand takes many forms, yet few manage to evoke the impact as the right photograph. The proper selection of photography plays an important role in telling an authentic brand story and should adhere to the underlying brand strategy.

Because there are so many different ways to use photography in brand communications, no one guideline works in all situations. Therefore, the following is a set of general recommendations/photography samples illustrating images designed to tell the Banyan Wealth brand story in a meaningful and authentic way.

Please note that the below photography is provided to display visual tone. Availability may be limited based on communication channel and purchase requirements.



## Photography

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### Guidelines

Our photographs, the most emotionally resonant component of our visual style, are the embodiment of our brand personality. Good photography captures the essence of Banyan Wealth. It should communicate passion, security and optimism. It should be inviting, emotional, compelling and capture the Banyan Wealth brand tone. When used, actors should look authentic in natural settings.

### What Works

- Positive and inviting expressions (when actors are used)
- Natural (not overly stylized)
- High-quality photography

### What to Avoid

When choosing photography, it is important to ensure that every aspect of the image reinforces the notion of provoking viewers to rethink the subject being presented to them.

- People in our photography may never be shown demonstrating negative emotions. This imagery is counter to our brand image.
- These types of images are insincere advertising clichés, and are therefore off-brand.
- People should always be portrayed as positive, vital, and confident, never defeated, bedraggled, or resigned.
- Confidence or peace of mind should never be shown as caricatures of people “kicking back” or in an exaggerated or boastful way.” This rings untrue and is disrespectful to our audience.
- Never use an image that has been distorted.

### Use of Stock Photography

When in need of photography, it is required you obtain from a stock photography source such as Getty Images. It’s always recommended that you select royalty-free images as this will allow for use multiple times for multiple projects without incurring additional fees. It’s important to keep in mind that royalty-free image licenses are always nonexclusive, which means the image is available for anyone to use.

***Please note that our photography strategy will continue to evolve.***



## Layouts

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### Email Signature Line

The signature line should appear in varying weights and point sizes of Calibri. The sender's name and title should be bold, green in color and 14 pt. The sender's title should be bold, gray in color and 10 pt. Recognitions should be gray in color and 10 pt. Address and phone numbers should be gray in color and 9 pt. Disclaimer should be light, gray in color and 8 pt.

**Nicholas W. Sergio, AIF®**  
**Chief Executive Officer, Banyan Wealth**  
**Registered Principal & Financial Advisor, RJFS**  
2021 RJFS Leaders Council Member\*



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**Layouts**

**Business Cards**

 **banyan wealth**  
Wealth Management & Financial Planning  
  

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**Letterhead**

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# Be Inspired

With over 100 years of marketing experience and a portfolio that includes both global brands and small businesses, we're not your traditional agency. We believe in the power of partnership and personal connections. It begins with our Partner promise and a passion for developing brands and creative solutions that inspire customers and drive results. A passion that extends to masterful storytelling deeply rooted in creative artistry, marketing science and a customer experience focus. Delivered with the personal attention of a boutique agency but with large agency value.

*Every brand has a great story. Let us help tell yours.*

For additional questions or information, please contact [info@musemc.com](mailto:info@musemc.com).



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