



BRANDING GUIDE

Revision 2.0 | Updated 5/10/13



BRAND ESSENCE



A THOUGHTFUL APPROACH

The 1 North Wealth brand is characterized by a unified visual theme designed to convey an image of professionalism and discretion to our targeted audience of new and existing clients (\$500K or larger GAI).

Maintaining the integrity of brand communications through consistent use of colors, typography and imagery at every touchpoint increases our value and recognition as a regional financial planning and management leader.



LOGO

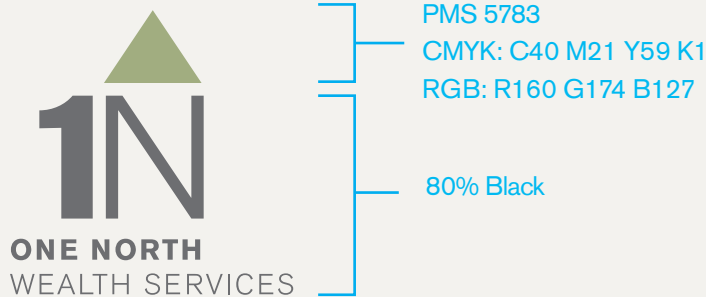
CORPORATE MARK

The corporate mark is always shown with the words “One North Wealth Services”.

To preserve integrity of the brand, logo must be reproduced in corporate colors as shown.

See page 2 to obtain correct CMYK, RGB or HEX equivalents for brand colors.

Preferred Color Usage



[Click here](#) to download print resolution jpeg

[Click here](#) to download web resolution jpeg

[Click here](#) to download print resolution png

[Click here](#) to download web resolution png

Preferred Black & White Usage



[Click here](#) to download print resolution jpeg

[Click here](#) to download web resolution jpeg

[Click here](#) to download print resolution png

[Click here](#) to download web resolution png

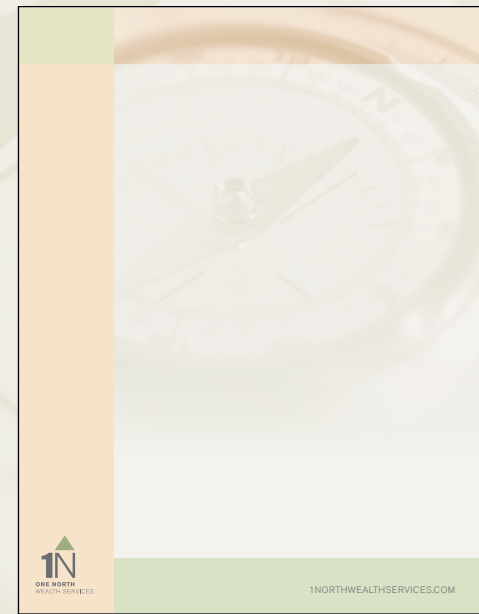
LOGO

DESIGN ELEMENTS

The Monochrome Compass provides atmosphere and interest in support of the 1 North corporate brand. It is provided below in portrait and landscape orientations.



[Click here](#) to download landscape letter-size compass graphic



[Click here](#) to download vertical letter-size compass graphic

COLORS

BRAND PALETTE

Foundation Colors are used *for typography only*.



PMS 424
CMYK: C0 M0 Y0 K70
RGB: R109 G110 B113
HEX: #6D6E71*

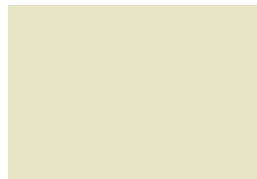


PMS 308
CMYK: C100 M58 Y32 K13
RGB: R0 G90 B132
HEX: #0D6FA0*

Accent Colors are used *for backgrounds, the design grid and all other color specific elements*.



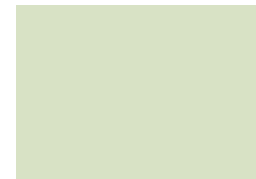
PMS 5783
CMYK: C40 M21 Y59 K1
RGB: R160 G174 B127
HEX: #A0AE7F*



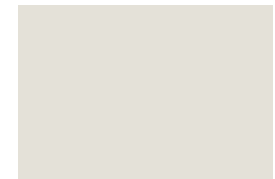
PMS 5807
CMYK: C10 M4 Y29 K0
RGB: R229 G230 B198
HEX: #CCCC99*



PMS 475
CMYK: C3 M16 Y34 K0
RGB: R245 G213 B172
HEX: #F5D5AC*



70% PMS 7485
CMYK: C15 M3 Y22 K0
RGB: R217 G228 B205
HEX: #D9E4CD*



50% PMS 7527
CMYK: C6 M7 Y9 K0
RGB: R236 G221 B225
HEX: #ECE7E1*

* Due to the limitations of matching HEX colors to the brand palette, please specify RGB for all web elements whenever possible.

DOCUMENT MANAGEMENT

FONT SPECIFICATION

Akzidenz Grotesk is the preferred font family for all 1 North Wealth communications. If Akzidenz Grotesk is not available, the Arial font family may be used as a substitute.

Berthold Akzidenz Grotesk Light

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Berthold Akzidenz Grotesk Regular

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Berthold Akzidenz Grotesk Bold

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

DOCUMENT MANAGEMENT

USE OF TYPE STYLES

A typographic system helps preserve consistency among documents from differing sources. Please use this styling and color guide when preparing all documents or collateral.

If Akzidenz Grotesk is not available, the Arial font family may be used as a substitute.

LEVEL 1 HEADLINES 23 PT. PMS 308 BLUE

Preferred usage of Level 1 headlines is Akzidenz Grotesk Light ALL CAPS.

Level 2 Subheads 16 pt. 80% Black

Preferred usage of Level 2 subheads is **Akzidenz Grotesk Bold**.

Level 3 Subheads 14 pt. 80% Black

Preferred usage of Level 3 subheads is *Akzidenz Grotesk Italic*.

Body Copy 12 pt. 80% Black

Preferred usage of Body Copy is Akzidenz Grotesk Regular.

DOCUMENT MANAGEMENT

EMAIL SIGNATURE

Please follow the template below in Arial and Arial Bold for all email correspondence.



Jay C. Middleton, ChFC®
P 410-975-0099
F 443-557-0862
601 Baltimore-Annapolis Boulevard Suite 202
Severna Park, MD 21146

OFFICE: 410-975-0099
FAX: 443-557-0862
WEBSITE: <http://www.mggadvisors.com>

Corporate Mark:
Use 100x100 px logo
on white background

Name:
Arial Bold 12 px
Dark Blue (HEX #0D6FA0)

Contact Info:
Arial Regular 12 px
Dark Gray (HEX #6D6E71)

Warning: All e-mail sent to or from this address will be received by the One North Wealth Services e-mail system and is subject to archival and review by someone other than the recipient. One North Wealth Services LLC does not take responsibility for, or accept time-sensitive instructions sent by email including orders or fund transfer requests. All instructions of this nature must be handled by direct communication.

[Click here to download a 100x100 px jpeg logo](#) suitable for use as an email signature.



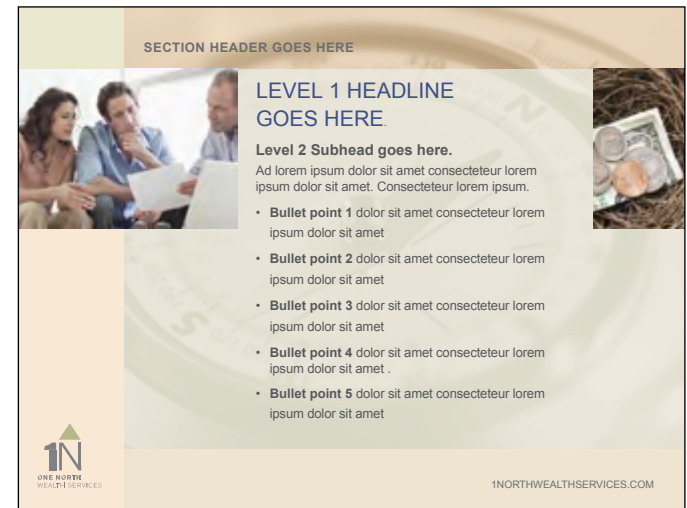
DOCUMENT MANAGEMENT

POWER POINT

The 1 North Wealth presentation style is clean, orderly and reflects the professionalism of our brand. [Click here](#) to download a power point template set up according to these standards.



Main Title Card w/visual



Slide with Images and Section Header

DOCUMENT MANAGEMENT

DOCUMENTS

The 1 North Wealth system includes a branded starter template for internal and client-facing documents, with text-editable header and footers for 1st and secondary pages. [Click here](#) to download in MSWord.



THE FINANCIAL PLANNING PROCESS

STEP ONE: THE INITIAL CONSULTATION

My goal for this meeting is to explore ways to help you achieve your financial goals. It also serves as an opportunity for you to learn about our fee-only financial planning services. This meeting typically lasts just over an hour. Following the meeting, I will send you two Engagement Contracts: the Comprehensive Engagement under which we work on all aspects of your financial plan and the Single Goal or Hourly Engagement in which we focus on just one key issue. Once you return the appropriate contract to suit your needs, I will begin your Document Analysis.

STEP TWO: DOCUMENT REVIEW AND ANALYSIS

Timeframe: As soon as signed contact and all applicable documents are received

Along with the contract, you should submit your most recent financial documents as listed on the Document List (if you have not already done so). If you can't locate a listed document, don't let that prevent you from sending me what you do have so I can begin your review and analysis. I will let you know prior to or at our Financial Analysis Meeting if I require additional information.

STEP THREE: FINANCIAL ANALYSIS MEETING

Timeframe: ~2 weeks after documents have been received

Once I receive your documents, I will enter your data into my proprietary financial analysis software and then I will analyze the issues, possible strategies, what-if scenarios, and potential roadblocks that may exist in your financial future. I will then call you to schedule our next meeting to review this analysis. This meeting typically lasts an hour and a half and we'll discuss all issues, initial recommendations, and your preferences for what-if choices (such as work longer vs. retire with less). Once I know your preferences and have confirmed your financial data, I will begin to write your Financial Plan. Please note: you will not need to write anything down during this meeting as all discussions and recommendations will be provided in your Financial Plan Presentation.

STEP FOUR: FINANCIAL PLAN PRESENTATION

Timeframe: ~2 weeks after Financial Analysis Meeting

At this meeting, we will review your Financial Plan and I will provide you with Action Items that we will work on together during this first Quarter of our relationship. Because these meetings have been filed with financial analyses and recommendations, I

1



THE FINANCIAL PLANNING PROCESS

suggest you thoroughly review the Workbook provided following the Presentation and call me to schedule our next meeting – the first Quarterly Review – which is included in your contract.

STEP FIVE: QUARTERLY REVIEWS

Timeframe: Every quarter

As stated above, the first Quarterly Review should happen as soon as you have had time to review the Financial Plan and are ready for my assistance in implementing the recommended Action Items. From there, we will set up Quarterly Meetings to update your plan, implement new recommended changes, and determine if you are still on track with your financial goals.

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DOCUMENT MANAGEMENT

IMAGERY

Primary imagery for the 1 North Wealth brand is about people.

Focusing on individuals or couples in aspirational settings conveys belief in our hopes, dreams and destinations. Photography should address diversity in clientele, with emphasis on mature market.



Secondary imagery for the 1 North Wealth brand is about finances.

Secondary photography is abstract, symbolic and related to the financial category.



CONCLUSION



BUILDING THE BRAND.

Please feel free to use this document as an interactive tool so the reference and assets you need are always at your disposal.

Leveraging this visual system with existing and prospective clients, partners, and other stakeholders is a worthwhile investment towards building trust and increasing the value of the 1 North Wealth brand.

