



# FINANCIAL MARKETERS' RESOURCE BOOK 2016



**A Financial Marketers' Guide to the Most  
Valuable Partners in Financial Marketing**

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## LETTER FROM BILL WREAKS, CEO &amp; CHIEF ANALYST, GRAMERCY INSTITUTE



## "Partnership"

Today, the term can be overused and its meaning can be undervalued.

In the last five years, the concept of "partnership" has exploded in financial marketing. Perhaps this explosion can be attributed to a "do more with less" downward staffing trend on the part of financial brands on the heels of "The Great Recession?" Perhaps it's simply that marketing and media have become much more complex and a need for specialization in marketing services has become more pronounced. Perhaps, too, it can be said that the idea of a financial firm using a "partner" rather than an in-house expertise has become more acceptable from in our business culture.

Whatever the reason, I believe that few marketers at financial brands will argue that partnership with outside experts and service providers is a big part of financial service marketing. In fact, many major financial brands have people in place on the marketing team who are there to specifically seek out and manage the partnership needs of the financial brand.

This all said, Gramercy Institute has detected that a problem (let's call it a need) now exists in the wake of financial marketers' partnership explosion. That is, how does a financial marketer have the expertise to understand 1) what types of service a financial brand should be considering to engage and 2) once determined, who (specifically) are the partner brands that a financial brand should consider.

In response to such needs, Gramercy Institute asked the its network of senior marketers from major financial firms to nominate "who's doing it right" as partners in the financial services marketing industry.

Once nominations were in place, Gramercy Institute engaged a panel of judges comprised of the following leaders in our field to assess and judge each nomination.

Nominations were ranked according to Value to Marketer, Innovation Engaged, Customer Support Provided, Degree to Which Expectation Were Met as well as the Degree to Which Expectation Were Exceeded. Essays were also included in the nomination process. Nominators were asked to write brief essays on

The partner's "Commitment to Partner's Business" and on the ultimate "Value Given to Partner". Nominations were then graded for both "Content" and for "Enthusiasm" of nominator. The scores were then tabulated. What, then, we arrived at was a list of 20 Most Valuable Partners in Financial Marketing. Partner teams were invited to receive their awards at a special ceremony last March.

Now comes the interesting part, Gramercy Institute felt that these 20 MVP firms represent the best of the very best in terms of partnership in financial marketing. So, we comprised this compilation of MVP Profiles to give more detail and more meaning behind the services and the value provided by Gramercy Institute's 20 MVP's.

**Bill Wreaks**  
CEO & Chief Analyst,  
Gramercy Institute



## WHAT IT TAKES: About the 20 Most Valuable Partners in Financial Marketing

Whatever the reason, few financial marketers will disagree that partnership with outside experts and service providers has become a serious part of financial services marketing. In fact, many major financial brands hold marketing managers in place to specifically seek out and manage its partnership needs.

This all said, Gramercy Institute poses two related question to the industry in the wake of financial marketings' partnership explosion. That is, 1) how does a financial marketer today have the strategic expertise to understand exactly what types of partner services his brand should engage and 2) once determined, which (specifically) are the partners that a financial brand should consider.

In response to such needs, Gramercy Institute asked the its network of senior marketers from major financial firms to nominate "who's doing it right" as partners in the financial services marketing industry through a nominate our industry's "Most Valuable Partner" (MVP) program. Once nominations were in place, Gramercy Institute engaged a panel of distinguished judges comprised of the following leaders in our field to assess and judge each nomination:

Nominations were then ranked by judges according to **1) Value to Marketer, 2) Innovation Engaged, 3) Customer Support Provided, 4) Degree to Which Expectations Were Met as well as 5) the Degree to Which Expectation Were Exceeded.**

Essays were also included in the nomination process. Nominators were asked to write brief essays on a nominee's "Commitment to a Partner's Business" and on the "Ultimate Value Given to Partner." Nominations were then graded for both "Content" as well as for "Enthusiasm" of Nominator." The scores were then tabulated.

At the end, the Gramercy Institute arrived at a list of the **20 Most Valuable Partners in Financial Marketing.** Partner teams were invited to receive their awards at a special ceremony last March.

So, we comprised this compilation of MVP Profiles to give more detail and more meaning behind the services and the value provided by Gramercy Institute's 20 MVP's. These profiles follow.

### JUDGES

**Louis Cohen**, SVP, Head of Search, Affiliate Marketing & Lead Generation, Citi

**Marty Dauer**, Chief Marketing Officer, Duff & Phelps

**Rich Smith**, CMO, Ditech Mortgage Corp.

**Anthony Vitalone**, Head, Digital Mktg & Social Media, Deutsche Bank - Asset & Wealth Management

**John Von Brachel**, Director of Content Development & Delivery, Merrill Lynch, Bank of America

**Jeffrey Wilson**, SVP, Marketing & Comms, GE Capital

GRAMERCY  
INSTITUTE  
**20**  
**MOST VALUABLE PARTNERS**  
in Financial Marketing  
**Award Ceremony**



Greg Yates, InvestingChannel, presents on "The Year of the Valued Connection" at 20 MVP's Award Show.



Andy Seibert (r.), IMPRINT with judges Lou Cohen, Citi and Rich Smith, Ditech (far left).



Tom Jago, The Ward Group.



Bob Verrico, CEO, InvestingChannel.



Judges Rich Smith (I.) and Lou Cohen (Citi) present Tyler Grundmeier, EverFi with his team's 20 MVP's award.



Daniel Rothman, Financial Times, accepts his team's 20 MVP's award.



Scott Cohen accepts his team's award.



The Madison Logic team with judges.



Thomson Reuters accepts its "Most Valuable Partner Award."

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*"It's now time to honor partnership in financial marketing"*

**Bill Wreaks, CEO,  
Gramercy Institute**

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The Wilde Agency's John Sisson displays his team's trophy.



Gil Biegacz, Rocket Fuel, accepts his trophy on behalf of his team.



MVP Taboola accepts the team's trophy.



Yext accepts its team's MVP trophy.



20 MVP Award winners Andy Seibert, IMPRINT and Sullivan's Nancy, Schulman



Bob Verrico (left) with Greg Yates (second from right) of InvestingChannel

# hnw

“HNW is a boutique strategic marketing and creative agency to the financial services industry.”

Our niche is the art and science of delivering personal financial advice and guidance, with a distinctive B2B2C approach that bears not only the needs of the affluent consumer in mind (where we take our name) but the advisor who serves them. Our Hallmark is 15 years of proprietary and ongoing research into the nature of the advice relationship, and how best to honor it in building our clients' business.

These clients include the most prominent of wealth- and asset managers, custodians, private banks and insurance companies.

We provide our clients with a range of strategic marketing consulting and campaign creative and content services, including account planning and segment research, new product and service launches and integrated, multi-channel B2B2C campaigns.

Our approach is known for being discrete, candid, insightful, collaborative and fun, with a product that delivers the results that our clients—and their advisors and clients—demand.

### MISSION STATEMENT

Our mission is to grow a thriving, niche agency where people love the work—and the work delivers for our clients.

### BRIEF COMPANY HISTORY

HNW was founded in 2001 as the successor to worth.com. It was out of those roots as a high-net-worth consumer portal that we draw our subject matter expertise as content marketers to high net worth consumers and the advisors who serve them.

### WHAT MAKES THIS PARTNER UNIQUE

Our blend of deep strategic management and marketing consulting with award winning creative execution focused exclusively on the investments and advice industry makes us a truly unique, unapologetically niche player. While we may be boutique, we are proud to partner with some of the largest, most respected players in the industry—many for over a decade.

### LEADERSHIP



**Stacey Haeefe,**  
President & CEO

Stacey is a strategic marketer with over 20 years of professional services experience in investment

banking, management consulting and digital agency services. A leading expert and frequent industry commentator on high net worth consumers and the brands, advisors and institutions who seek to serve them, Stacey has appeared on CNBC, Fox News, The Closing Bell with Maria Bartiromo and has been widely quoted in both industry and consumer publications, including The Wall Street Journal, The New York Times, AdAge, Financial Planning, Registered Rep and FundFire, to name a few.

As President and Chief Executive Officer of HNW, Stacey is responsible for the firm's day to day operations, serves as an advisor to senior clients, and leads business development, investor relations and strategic communications.



**Susan Chung,**  
COO

With over 20 years of marketing and management experience, Susan is responsible for HNW's

agency operations, business growth, talent development and staff retention. Prior to HNW, Susan served as senior partner and managing director at Ogilvy and Mather.

During her seven years there, she led integrated, cross-functional teams that delivered brand and retail engagement strategies to address changing customer needs and organizational restructuring.

Prior to Ogilvy, she served as the North American brand director for Intel at Euro RSCG and senior vice president, group account director at Hill Holliday.

Chung earned her B.S. at Boston University.



*Our approach is known for being discrete, candid, insightful, collaborative and fun, with a product that delivers the results that our clients—and their advisors and clients—demand.*



#### KEY PRODUCTS AND SERVICES OFFERED

HNW offers two types of services on a retained team or per project basis:

##### 1) Strategic Marketing Consulting,

including: quantitative and qualitative market research to support planning, new product launch strategies and content marketing strategies.

##### 2) Creative Campaign Execution,

including: content development services (e.g. long-form editorial content, marketing collateral, selling systems development) creative services, e.g. direct mail, e-mail, web and micro websites, print campaigns, video and animation.



James McLaine, Group Creative Director at HNW, receives his team's MVP Award.

#### HOW WE DELIVER VALUE TO FINANCIAL MARKETERS:

*HNW is a strategic marketing partner to the wealth and asset management industry. On a retained or per project basis, marketers rely on HNW to cut through the clutter with strategies, content and campaigns that helps sales sell.*



*In marketing to the high net worth, the advisor relationship is paramount. In the end, if the advisor doesn't buy it, you can't sell it.*

**Stacy Haefele, CEO, HNW Inc.**



#### FOR MORE INFORMATION

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**HOFFMAN  
AND PARTNERS**

“ We help our clients find a distinct brand voice and personality that is relevant, motivating and different in the eyes of customers. ”

Hoffman And Partners specializes in helping challenger brands compete with the bigger name, bigger spending category leaders and win market share and sales. Most of the financial services clients who have hired us were not the leaders in their respective fields when we were engaged, but all possessed brand attributes and benefits that, when leveraged correctly, served to enhance their market position. Typically, two or three companies dominate a category, leaving the rest of the pack struggling to gain attention and distinguish themselves. We help our clients find a distinct brand voice and personality that is relevant, motivating and different in the eyes of customers. We help our clients identify and communicate real and perceived benefits that reward customers for their time, attention and ongoing relationship with a client's product or service. In a competitive category dominated by a few giant companies, we help our clients win.

#### MISSION STATEMENT

Hoffman And Partners employs a balance of strategic discipline and creative insight to help clients compete successfully with better known, bigger spending rivals - and win.

#### BRIEF COMPANY HISTORY

Reflecting Boston's large and diverse financial business community, Hoffman And Partners began with major clients in insurance, discount brokerage, mutual funds and market analytics. Although

clients in many other categories were later added, the principals have leveraged the firm's affinity for financial marketing into a national client base that has fueled the agency's growth.

#### KEY PRODUCTS AND/OR SERVICES OFFERED

We are a boutique firm with a specialization in the areas of brand and product strategy, research management and analysis, creative execution, and both traditional and digital media capabilities.

#### WHAT YOU DO & HOW YOU DO IT

Hoffman And Partners is a strategic communications partner for financial marketers who require a smart, disciplined and inspired approach to successfully compete against larger rivals.



#### WHAT MAKES THIS PARTNER UNIQUE

We are Giant Killers®. No other New England based firm has helped more entrepreneurial and mid-sized businesses go up against giant competitors and come out with share gains, increased sales, new customers and, along with it, a distinctive and differentiated brand story.

#### LEADERSHIP



**Bob Hoffman**  
President & CCO

Bob was a founder of Gearon Hoffman, Boston. Gearon Hoffman distinguished itself with a reputation for focused strategies and creative excellence. The agency earned a national reputation for building successful brands across many industries, among them Scot-trade online brokers, Rockport shoes, Samuel Adams beer, the Brown & Company discount brokerage division of J. P. Morgan Chase,

and many others. Bob is a student of human behavior and is fascinated by what drives consumers to act. As a writer, strategist and creative director, his role is to uncover the emotional links that connect customers with a brand. The results are smart, motivating messages that enhance favorable consumer perception. Bob is also a musician, so he knows how to play with others. He earned a BA degree from Antioch College, and a graduate degree in communication from the University of Pennsylvania.

“ We specialize in helping challenger brands compete with big name, big spending category leaders and win market share and sales ”

**HOW WE DELIVER VALUE TO FINANCIAL MARKETERS:** *In a competitive category dominated by a few giant companies, we help our clients win.*

**WHAT CLIENTS ARE SAYING**

“ Bob Hoffman is an extraordinary creative genius. Bob was the outstanding creative mind behind both the serious Scottrade iconic Helicopter TV ads and several other campaigns, including the “Bad Financial Adviser” campaign, which was funny and compelling. His insights and creative executions were stellar. Bob is a financial services creative guru who is passionate and committed to the success of a program, but not afraid to argue with the client, when needed. A+ ”

**Chris X. Moloney**, former CMO, Scottrade



**FOR MORE INFORMATION**

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# IMPRINT



Experts at interpreting a client's brand standards and creating a full spectrum of branded content



Imprint creates content and distribution strategies that combine a deep understanding of customer behavior with exceptional creative talent to engage and drive lasting business growth. Our five guiding principles are:

We are relentlessly creative in our approach. Our content is always tailored to reader behavior – driving us to think broadly and differently – making real relationships with clients' customers possible.

We inspire action. Our industry expertise makes us fast and efficient in generating relevant, custom pieces that inspire customers to engage with your brand.

We're channel agnostic. We design liquid content that flows seamlessly among channels – be they digital, mobile or physical.

Clients' goals are our goals. We create more than just custom content – we build custom experiences that align with your growth objectives to deliver measurable results.

Clients are our focus. As an independent firm, our sole responsibility is to do right by our customers for the benefit of theirs – no 'big firm' obligations or juggling.

## MISSION STATEMENT

We believe that for companies to build real, lasting relationships with their customers, you need to provide impactful content that educates, informs and provides moments of inspiration through appropriate distribution channels. We help clients build these meaningful relationships with their customers through actionable and measurable content strategies.

## BRIEF COMPANY HISTORY

Founded in early 2013, Imprint is a NYC-based, full-service content strategy and custom communications agency majority owned by Sullivan, a brand engagement agency. The combination of agency talents creates a powerful end-to-end client offering that can take a brand out to its fullest expression through content marketing execution. Over the past two years Imprint has been recognized for both the programs we have created for clients and for being an emerging leader in content marketing. In addition to our thought-leadership blog, [MakeContentContagious.com](http://MakeContentContagious.com), Imprint has won nearly 20 industry awards.

## WHAT MAKES THIS PARTNER UNIQUE

Imprint's editorial and design teams are experts at interpreting a client's brand standards and creating a full spectrum of branded content. We understand clients' brand, style and audience and are a great resource to teams for all content needs including: content strategy, interactives, articles, videos, mobile apps, infographics, eNewsletters and tablet magazines.

## LEADERSHIP



### Andy Seibert, Managing Partner

Andy founded Imprint in early 2013 after almost two decades in the custom content industry. His

experience at American Express, GE Capital, Time Inc., Hearst, SmartMoney and Dow Jones gives him both a client and publisher perspective on content marketing. He has created successful, long-running programs that combine a deep understanding of customer behavior with creative talent. Andy also is Chairman of The Content Council, the leading association of custom publishers in North America.

The **Imprint** team is comprised of seasoned professionals and fresh new faces, built to deliver on today's content marketing needs, combining proven best practices with today's smartest innovations.

*The leadership team includes:*

- Ken Williams, Managing Director
- Georgia Galanoudis, Managing Director
- Ashley Brenner, Creative Director
- Russell Pearlman, Editorial Director
- Kate Barchie, Executive Director Client Solutions

## KEY PRODUCTS AND SERVICES OFFERED

We offer a complete range of strategic and creative services. Clients rely on us for everything, or just tap into what they need.

**1. CONTENT STRATEGY:** A focused approach for developing effective communications is as important as the communications themselves. Our team can quickly assess where clients are and establish a content roadmap. These steps include:

- Confirm business goals
- Assess current content
- Understand target audience
- Determine topics, timing and platforms
- Measure, optimize and hone strategy

**2. CONTENT CREATION:** Our editorial and design teams embrace everything about a client's business and customers. Tapping our deep experience working with the world's leading brands, we then create engaging content that enhances brands and inspires readers to learn more. Services include:

- Understand audience behavior
- Assign editorial expertise
- Apply design perspective
- Overlay digital best practices
- Manage with precision
- Content monitoring
- Competitive landscapes

**3. PUBLISHING + MEASUREMENT:** Now it's time to put the content to work. Our publishing experts leverage a variety of platforms — digital, mobile, social, in-person, and, yes, print — to make sure clients are in front of their targets in the right place at the right time. We analyze the results and help determine ROI, on an ongoing basis, tweaking the content and channels to continuously improve outcomes.

### SPECIFIC OFFERINGS:

**Digital:** Online solutions including site design, email and social marketing.

**Mobile:** Engage the audience wherever they are. Tablet apps, smartphone apps, responsive design, and websites.

**Publications:** Create digital and paper experiences that compete with subscription-based pieces. Magazines, newsletters, booklets, and white papers.

**Video:** Bringing a variety of your messages to every sized screen. Roundtable discussions, educational topics, and seminar series.

**In-Person:** Seminars, experiential.

### HOW WE DELIVER VALUE TO FINANCIAL MARKETERS:

*Imprint caters to solve the specific needs of each client, providing solutions and creating custom processes based on those needs. Our team capabilities include auditing and assessing existing strategies and helping clients to envision and embrace a new strategy. We help plan and optimize content by analyzing audience behaviors, content channels and timing of content releases. Our content experts create communications for our clients in all formats – print, digital and in-person – which we also are able to distribute across decided-upon channels. Finally, we determine 'did it work?' We set goals, gather data and determine how successful content was with customers and what their ROI is.*

### WHAT CLIENTS ARE SAYING



As our partner, Imprint is committed to delivering what we need to be successful. They have championed a new publishing model, challenged complacent thinking and pushed us to evolve, always in the name of improving our results.



- **Large Asset Mutual Fund Client**



### FOR MORE INFORMATION

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“ Award-winning interactive media platform with an influential audience of 18 million investors monthly, both retail and professional. ”

Our audience of influential decision makers are affluent, engaged, high-end lifestyle oriented and span the complete finance spectrum including Individual Investors, Active Traders, Financial Advisors, Institutional Investors and more. All avidly read and watch our expert perspectives (news, opinion, analysis, predictive market information) on current and changing financial landscapes, to gain the edge needed to succeed in today's volatile economy.

Within this coveted environment, InvestingChannel provides a complete suite of business services and solutions. For advertising partners specifically, a plethora of marketing solutions including standard/rich media ads, custom content/native integrated programs, custom design & development for brand campaigns, custom research, lead generation, dedicated email, robust audience data targeting, mobile/tablet, social media marketing, live/web events and more to authentically captivate audiences and drive results.

#### MISSION STATEMENT

InvestingChannel is the most innovative and scalable marketing platform in financial media. Our deep industry expertise, propri-

etary technology and specialized services, uniquely surface and combine expert content and rich data for marketers, publishers and financial audiences to engage and profit.

#### BRIEF COMPANY HISTORY

InvestingChannel was born from Giant Step Strategies, an online consulting firm launched by Bob Verrico and Nikesh Desai in 2007. Giant Step helped major financial media companies develop and grow their digital revenue initiatives by developing forward thinking media strategies, unique partnerships and industry best practices. It was during this timeframe Bob and Nikesh identified hundreds of independently run sites, written by industry experts, whom offered critical niche investing content to valuable niche audiences. These sites offered extremely valuable destinations for marketers, but due to their independent nature, the sites were disparate, not standardized in layout, or in ad serving technologies making it nearly impossible to capitalize. It was at this point InvestingChannel was born. InvestingChannel launched with 50 sites and now in 2015 has surpassed 300 sites reaching 18 million monthly uniques.

#### WHAT MAKES THIS PARTNER UNIQUE

InvestingChannel offers the intimacy of a single publisher, but with the optimization capabilities of a premium exchange. The unique nature of our exclusive site list boasts low duplication of audience among other financial sites. Our unparalleled product set includes ExactMatch, the largest database of Financial Advisors found online, in concert with, our creative solutions department who crafts, and develops effective advertising, creative, native content and social strategies for our advertising partners impacting campaign efficacy.

#### LEADERSHIP



**Gregory Yates,**  
Chief Marketing Officer

Prior to InvestingChannel, Mr. Yates built a new integrated media division at Fox Interactive Media, that

focused on content, social and emerging technologies extended across broadcast, 20th Century Fox, mobile, out-of-home and all FIM digital properties that included MySpace, IGN, AskMen, Fox.com, American Idol and Rotten Tomatoes. He held senior sales and marketing roles at UGO Networks and imeem where he built a client solutions department to construct and implement social content driven, cross-media programs pairing celebrities with top brands. He is a frequent speaker on innovative marketing topics and oft consults brand teams on bleeding-edge and future trends. Greg volunteers his time as Board Director for the FCS.



**Bob Verrico,**  
Co-Founder/Executive Chairman

Prior to founding InvestingChannel, Mr. Verrico led TheStreet.com's four revenue divisions includ-

ing advertising sales, product sales/marketing, business development and product development. Prior to TheStreet, he joined the founding team at Beliefnet and built and managed the company's ad revenue business.

In the late 90's, Mr. Verrico headed up iVillage's revenue initiatives including the advertising and business development teams. He started his career in the electronic and online world when he jointly built, launched and managed the successful Wizcom division of Avis which leveraged Avis' customer database in an early application of electronic database marketing.

## KEY PRODUCTS & SERVICES OFFERED

InvestingChannel offers a diverse product set that includes:

Robust audience data, Retail & Professional, and context targeting, all investment vehicles, across InvestingChannel's exclusive consortium of 300 sites with extended reach into the exchanges.

**Exact Match** – via an exclusive partnership with Meridian-IQ, InvestingChannel has developed the most accurate way to target over 1MM Financial Professionals and Insurance agents via a database of cookies that have been EXACTlyMATCHed to corresponding profiles currently registered with FINRA or the SEC. This isn't look-a-like data – it's actual professionals who are registered and on record. The database is updated, for accuracy, regularly making it the most reliable source to effectively capture these important audiences both on InvestingChannel and across the exchanges.

**Native Content Dissemination** – InvestingChannel offers custom native content solutions that integrate brand content directly into the flow of investors' daily research.

**Social Media Marketing** – InvestingChannel features the #1 social site in finance for brands to integrate their messages via custom profiles and in-feed messages to actionable investors as they are analyzing, trading, researching sentiment and making important investment decisions real-time throughout the day.

**InvestingChannel Studio** – a special creative and strategy agency that produces experiential state-of-the-art content/native-integrated and out-of-the box large format executions responsible

for generating engagement, awareness and interactions that drive actions and lasting impressions. This division makes it extremely easy for marketers to challenge the status quo. Completely turnkey, InvestingChannel Studio develops brand, advertising and content strategies for partners and then executes from initial creative design through content creation, technology development, distribution, reporting and wrap up case studies.

Dedicated Email reaching millions of double opted-in investors that includes Individual Investors, Active Traders, Financial Advisors and Institutional Investors directly in the privacy of their inboxes.

Lead Generation capturing data on select audience segments based upon marketer needs.

Live and online events that include conferences, webinars and exclusive private engagements featuring Financial Advisors and other industry influencers.

**FA Research Institute** – A division of InvestingChannel surrounding everything needed to market effectively to Financial Professionals. Offerings include quarterly and custom research for marketers, brand studies, focus groups, market/campaign testing,

**Advisors In Focus** – a custom research think tank for marketers featuring custom panels of Advisors – psychology analysis to further understand Financial Professionals' needs and their journey to product consumption, content development, planning, strategy, creative design, technology development and custom events.

### HOW WE DELIVER VALUE

#### TO FINANCIAL MARKETERS:

*InvestingChannel provides distinct and engaged retail and professional audiences across a selection of sites that are part of an exclusive consortium. We offer unparalleled and proven turnkey product sets and industry expertise that makes it easy for financial marketers to promote their products, services and thought leadership while achieving ROI.*

## WHAT CLIENTS ARE SAYING

“ InvestingChannel has been a strong partner in developing successful campaigns with creative, technology and data to feed our content and fund information directly to Financial Advisors as they conduct their daily research across desktop, tablet and mobile environments. ”

**Sarah McCready**, Senior VP, Marketing, Direxion Investments



### FOR MORE INFORMATION

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“From brand to demand... from awareness through selection... activate your reach, results and ROI with the power of intent, from Madison Logic.”

From brand to demand... from awareness through selection... activate your reach, results and ROI with the power of intent, from Madison Logic.

Madison Logic provides the industry's most comprehensive B2B digital brand and demand-gen solutions powered by the world's most sophisticated and actionable intent data. Now, you can reach the universe of buyers for your products globally. And, you can pinpoint every company and decision maker currently in market for your offerings, at every stage of the buyer journey.

More than 4 billion buyer intent interactions. More than 2 million companies. More than 260 million decision makers across all key B2B industries and functions. Activate brand, demand and measurable business results with the power of intent, uniquely provided by Madison Logic.

#### MISSION STATEMENT

To take B2B marketing to the highest possible level of business impact

#### BRIEF COMPANY HISTORY

Founded in 2009, Madison Logic has created the industry's most comprehensive B2B digital brand and demand-gen solutions. Madison Logic also created the industry's first content-syndication platform for publishers in the B2B space. The company developed their Content Consumption Monitoring technology to measure intent topics to identify in-market interest on these topics. This technology was then spun off into its own company, now known as Bombora Data.

#### WHAT MAKES THIS PARTNER UNIQUE

We are the only provider of intent driven solutions and our database represents over 4 billion buyer intent interactions, more than 2 million companies, and more than 260 million decision makers across all key B2B industries and functions.

#### LEADERSHIP



**Tom O'Regan, CEO**

Tom O'Regan is CEO of Madison Logic, the data driven full-funnel B2B media and marketing solution powered by intent. Madison Logic's solutions leverage the world's largest set of demographic and purchase intent

data in B2B marketing, based on a billion interactions per month with decision makers across all industries. Through its publisher platform, Madison Logic also aggregates digital and mobile display inventory from 1,200 premium B2B media outlets, enabling brands to reach and interact with more than 125 million decision makers monthly.

Previously, O'Regan was CEO & Principal of TOR Media Group, a boutique firm providing investment and programmatic trading solutions to clients in the online ad tech industry. Prior to that, he served as President and Chief Revenue Officer of Martini Media,

the global leader in engaging the affluent and influential online, overseeing all revenue, marketing and global operations. O'Regan achieved record growth, increasing revenue 4x during his tenure at Martini Media, as well as receiving numerous awards.

Before joining Martini Media, O'Regan was SVP of Advertising at TheStreet, functioning as the senior business executive responsible for all media revenue, operations, marketing and product development, helping to develop and implement strategy and manage day to day operations.

Earlier in his career, he was an Associate at Deutsche Bank on the Fixed Income Trading Desk within the Global Investment Management Group.

O'Regan sits on the Advisory Board of The Fiscal Times, both the Sales Executive Committee and B2B Operating Group at the IAB. He resides on the Upper East Side of NY with his wife and their 2 daughters.

## LEADERSHIP

**Thomas Koletas**

Thomas Koletas joins Madison Logic with over 15 years of sales and executive experience and is responsible for managing all sales and revenue generating initiatives on behalf of Madison Logic's publisher, agency and advertiser clients.

Most recently, Mr. Koletas served as VP of Advertising Sales at Giant Realm, where he helped shape the sales strategy of the New York-based entertainment portal/ad network geared toward video games, sci-fi and independent movies and music. Before Giant Realm, Tom was head of sales at Imaginova Networks, where he implemented the advertising sales strategy, as well as managed

the national online ad sales and account management teams.

Prior to joining Imaginova, he was Vice President of Advertising for IndustryBrains, a pioneer in the search and contextual advertising market. There, he was instrumental in growing the company from start-up mode to its acquisition by Marchex, Inc., a publicly traded company specializing in vertical and local search marketing. Earlier in his career, Tom held senior sales positions at TheStreet.com and Ziff Davis, and is an advisor to many companies in the media and direct response area of digital marketing.

Tom attended Denison University.

**KEY PRODUCTS AND/OR SERVICES OFFERED**

Please describe the key products and services that your company provides that might be of most relevance to senior marketers at major financial firms. You may elect to describe several products/services, a few, or only one. The choice is yours.

Full brand to demand suite of products including an Account-Based Marketing suite that are all powered by Intent data.

**ACTIVATE ABM SUITE**

Enables marketers to define their target/named account lists in order to identify the accounts from among the leads you are generating via Madison Logic and other sources. Additionally, we can predict which accounts you should be targeting, based on which companies are showing the most interest in your products/services and identify the accounts based on your site traffic.

**HOW WE DELIVER VALUE TO FINANCIAL MARKETERS:** *Madison Logic through its use of intent topics helps to identify every company and decision-maker in-market for your offerings at every stage of the buyers journey.*

**WHAT CLIENTS ARE SAYING**

Modern marketers are in the midst of a revolution in activating brand and driving demand at every buyer journey stage through the use of intent data. Madison Logic uniquely enables this revolution.



**Tom Stein**, Chairman & Chief Client Officer, Stein IAS

**FOR MORE INFORMATION**

Kevin Mulrane, Vice President Global Revenue Operations

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“ We listen to your needs and deliver cost-effective, response-driven programs ”

We're one of the fastest-growing marketing and advertising agencies in the nation. We listen to your needs and deliver cost-effective, response-driven programs. We're a dynamic mix of veterans and young blood. We focus on results and are channel agnostic. Our diverse client roster includes leaders in the telecom, technology, healthcare and financial services industries - each of whom rely on us to help them advertise responsibly™.

### BRIEF COMPANY HISTORY

Quattro was formed in 2004 with the merger of four direct marketing agencies combining the strategic leadership from the Philly areas' top marketing, advertising and media agencies.

### KEY PRODUCTS AND SERVICES

#### Strategic Planning

What's at the core of Quattro's value proposition? Our agency group is staffed with former financial services marketing executives and managers that understand industry best practices, regulatory/compliance challenges and cross-functional business impacts. It is what sets us apart from other agencies that operate in the financial services arena.

#### Creative Services

We built our creative services platform to yield optimal results in the intensely competitive environment of financial services marketing. By leveraging our client's brand and integrating pure direct-response methodology, Quattro generates breakthrough, highly responsive creative and advertising programs.

#### Digital Services

Social Media, Content Marketing, Search Marketing, Mobile Marketing – Quattro helps financial services companies transform and integrate their marketing strategies into actionable, optimized digital programs.

#### Production Management

Quattro provides comprehensive print production, fulfillment and postal management services that will meet your pricing, scheduling, and quality expectations.

#### Data/Media

Quattro provides full-service media planning and buying for print, outdoor, radio, and DRTV. We also have a unique data services capability for building data warehouses, prospect databases and targeting models that optimize results and responsiveness of your target audience.

### WHAT MAKES THIS PARTNER UNIQUE

Quattro is a full-service marketing and advertising agency that provides their clients with highly targeted, highly effective marketing programs that generate new customers and new leads as well as generate more revenue from their current customers. We develop and implement customized strategic marketing programs designed to optimize results across all media channels.

### LEADERSHIP



**Scott Cohen,**  
CEO & Founder

Scott Cohen is an award-winning adman and entrepreneur, and founding partner of Quattro. For over 30 years, he has been a creative force in the Philadelphia marketing and advertising community, with expertise in the mortgage and insurance industries. He is the 2014 Philly Direct Marketing Association's "Marketer of the Year". Scott is into running and workouts, is an avid cinema buff, loves to travel, enjoys live music (especially jam bands), and has never, ever met a bad joke he didn't like.



**Thomas McNamara,**  
Founder

Thomas McNamara is a founding partner of Quattro and provides over 30 years of direct marketing experience to the agency. He has a deep background in the credit card, banking and payments industry and is an active member of the Philadelphia Direct Marketing Association, winning their Direct Marketer of the Year award in 2001. Tom enjoys weekends at the beach with his wife and dog and is an avid genealogist.



“ We specialize in helping challenger brands compete with big name, big spending category leaders and win market share and sales ”

#### HOW WE DELIVER VALUE TO FINANCIAL MARKETERS:

*Financial services marketers are faced with a variety of challenges, especially in the digital channel, because they are seeing diminishing returns and poor audience engagement in traditional advertising channels. Quattro understands today's financial services consumer and helps financial services firms develop cost-effective, responsive marketing programs across all channels.*

“ We're one of the fastest growing marketing and advertising agencies in the nation. ”



#### FOR MORE INFORMATION

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# SmartBrief

“ SmartBrief is a leading digital B2B media company with the goal of keeping busy professionals informed and prepared. ”

SmartBrief is a leading digital B2B media company with the goal of keeping busy professionals informed and prepared.

By combining technology and editorial expertise, SmartBrief delivers each day's most relevant industry news to more than 5.8 million senior executives, thought leaders and informed industry professionals. SmartBrief publishes more than 200 niche e-mail newsletters in partnership with leading trade associations and professional societies. Our editors go beyond the buzz, surfacing and summarizing only the most important and relevant industry developments from more than 10,000 major media outlets, regional newspapers, trade publications and blogs.

## MISSION STATEMENT

SmartBrief keeps busy professionals informed and prepared. SmartBrief is a leading digital B2B media company. By combining technology and editorial expertise, SmartBrief delivers each day's relevant industry news to more than 5.8 million senior executives, thought leaders and informed industry professionals.

## BRIEF COMPANY HISTORY

SmartBrief was launched in 1999. Our founders (two of which are still managing the company) took a smart idea being used in the White House and applied it to the business world with the goal of keeping professionals smart while saving them time.

## WHAT MAKES THIS PARTNER UNIQUE

Our audience (5.8 million opt-in business professionals), our model (we partner with trade associations so our audience is highly targeted) our content (combination of technology + editorial expertise) and our native advertising + content marketing capabilities.

## LEADERSHIP



**Rick Stamberger,**  
President & CEO

Rick Stamberger is president and CEO of SmartBrief, which he co-founded with in 1999.

Before his work at SmartBrief, Rick was a founding partner of Quest Partners LLC, a management consultancy based in Boston. He also served as executive vice president and a director of a Washington, D.C.-based technology firm owned by nine cable television companies and NBC. Rick began his career in Washington with the National Cable Television Association.

Rick served as a White House Fellow in 1984-85 in the Office of the Vice President. From 2008 to 2009, he was a member of President-elect Barack Obama's Transition Project, serving as an agency lead for the Executive Office of the President.

He is a graduate of Williams College and the Harvard Business School.



**Abiy Bekele,**  
Group Publisher

Mr Abiy Bekele, Group Publisher, leads the Financial Services (FS) practice at SmartBrief.

He started as an account executive in the media team where he sold digital advertising to firms including Yahoo!, DoubleClick/Google, ESPN, NYTimes and the Weather Channel. He then launched the FS group in 2006 with 5,000 subscribers. The practice now manages a circulation of 1,200,000 financial professionals (across . Prior experience includes business development at management consulting firm CEB, Inc. Abiy also serves on the Board of Directors of the Financial Communications Society (FCS), a national not-for-profit organization dedicated to improving professional standards in financial marketing communications through a mission of community, education and philanthropy.

“ We specialize in helping challenger brands compete with big name, big spending category leaders and win market share and sales ”

#### KEY PRODUCTS AND SERVICES OFFERED

##### Digital Advertising

- Display & Native Advertising (728x90 banner)
- Exclusive Sponsorship (Special Report, Spotlight, Dedicated Send)

##### Content Marketing

- White paper
- Full & Self-Service Webinars
- Executives Q&A
- Custom Newsletter



#### HOW WE DELIVER VALUE TO FINANCIAL MARKETERS:

*SmartBrief* is a digital publisher designed to keep business professionals smart while saving them time. In turn, we provide financial marketers access to a highly engaged audience ranging from Fortune 500 corporate executives to financial advisors, accountants, traders, high net worth investors and small business owners.

#### WHAT CLIENTS ARE SAYING

“ We found this to be a an effective way to promote both the brand and our retirement income capabilities to a high-value target audience of decision makers and influencers. ”

**Matt Housel**, Sr. Marketing Manager, Franklin Templeton Investments



#### FOR MORE INFORMATION

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## SULLIVAN

“ We believe in the power of brand at the 30,000-foot level, but we know someone's relationship with you is actually built at the 6-foot level, one interaction at a time. ”

Sullivan is a brand engagement firm.

We believe in the power of brand at the 30,000-foot level, but we know someone's relationship with you is actually built at the 6-foot level, one interaction at a time.

So we put brands to work changing your customer's experience for the better.

We look at every interaction through four lenses: user, business, practical, and emotional—and marry strategy, creativity, and technology to create experiences that deliver on all four dimensions.

Sullivan has enjoyed partnerships with American Express, Fidelity Investments, Bank of America Merrill Lynch, BlackRock, Charles Schwab, Liquidnet, MetLife and TD Ameritrade. Beyond financial services, we've also worked with blue-chip clients including ADP, Cognizant, Duke University, Human Rights Watch,

LinkedIn, Tyco and UPS.

**BRIEF COMPANY HISTORY**

Prior to founding Sullivan in 1990, Barbara Sullivan spent more than a dozen years in the financial services industry at companies like Chemical Bank and American Express, addressing and overcoming many of the challenges Sullivan now solves for clients.

She saw a void in the market that she created Sullivan to fill—translating a powerful brand positioning from 30,000-foot to the 6-foot level, where the sale happens. Sullivan grew from that commitment to remaining customer-focused throughout the entire marketing process—from fact-finding to planning to concept development and creative & technology execution. That perspective has remained as Sullivan has grown, and we work to make sure the customer point of view is paramount, even as channels and touch points evolve.

**WHAT MAKES THIS PARTNER UNIQUE**

We're an independent, woman-owned business with 25 years of industry experience. We've worked across many aspects of the industry, developing strategic and creative work for asset managers, retirement plan providers, banks, brokerage firms, wealth managers, RIAs, insurance companies, and institutional trading platforms. And we've talked to thousands of advisors, investors, and others to understand how people make decisions—both rationally and emotionally—about financial services.

**LEADERSHIP**

**Nancy Schulman,**  
Partner, Executive Director  
of Strategy

Nancy oversees our Financial Services practice. Her goal is to find the insight that will advance your organization in the most meaningful and measurable way. She has successfully tackled difficult branding and communications challenges with her unique combination of analytical skill, customer insight and creative thinking. She brings over 25 years of global agency and client-side experience.

Since joining Sullivan in 2007, Nancy has counseled the CIO of Merrill Lynch, developed an award-winning website for the accounting firm, Baker Tilly, and helped deliver campaign and business results for clients including Ameriprise, BlackRock,

Bloomberg, Business Wire, MetLife, Nasdaq, WebMD, and Windstream Hosted Solutions.



**Kevin Steen,** Managing  
Director, Strategy

Kevin serves as the lead for financial services projects. He brings more than 20 years of agency

and client side experience spanning the areas of asset management, banking, wealth management, insurance and retirement.

Kevin has directed messaging and communications development for numerous complex product marketing initiatives in financial services. He led the creation of new positioning and creative for Columbia Management after it was acquired by Ameriprise Financial, and contributed to Fidelity's launch of Pyramis Global Advisors, from high-level brand strategy to Web site development.

Since joining Sullivan in 2005, Kevin has also worked with many other leading financial services firms, including BlackRock, T. Rowe Price and TIAA-CREF.



We've found that taking an active, long-term interest in the nuances of our clients' businesses and their customers' thinking—and anticipating their current and future needs—will ultimately result in programs that succeed.

For five years, we've fielded our Rebuilding Investor Trust Study to look at people's attitudes and satisfaction toward financial advisors and institutions. And the senior leaders with that insight are the ones who work on your business.

We know how important it is to make every interaction count when complex, high-stakes relationships are being developed—the kinds that involve multiple stakeholders, high price points, a nuanced sales process and complicated subject matter. So we work hard to make financial services anything but boring. We bring our thinking and experience from other industries to help you break free from industry tropes so your message cuts through.

### KEY PRODUCTS AND SERVICES OFFERED

Sullivan brings together expertise in brand & product strategy, design, technology, content, customer experience, and channel planning to create experiences across digital, traditional and environmental touch points. We often help clients with high profile and high impact initiatives like:

- Re-brands
- Product and platform launches
- Expanding into new markets and target segments
- Lead generation
- Increasing adoption
- Recruiting new talent
- Employee engagement
- Sales enablement

In the process of achieving those goals, we often create:

- Value propositions
- Identities
- Channel strategies
- Websites, apps, emails, virtual reality, video, and 360 digital experiences
- Multi-channel campaigns
- Client onboarding experiences
- Messaging
- Workshops, presentations and seminars
- Collateral
- Thought leadership
- Event design

### WHAT CLIENTS ARE SAYING



Sullivan delivers strong strategic solutions, supporting its marketing efforts at all levels, including strategic, content and design... We praise Sullivan for its creative thinking, copywriting and design work, all of which is excellent, delivering stand out work and helping us think outside the box.



• *Leading Financial Services Client*



### FOR MORE INFORMATION

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The world's largest network for senior marketers from major financial firms



Trafficbuyer Digital partners with businesses to bring the marketing leadership and execution required to launch, maintain and profitably scale business models online. Our core offering is segmented into two key practices; digital marketing and analytics.

The digital marketing practice provides digital media strategy, planning, buying and campaign management services. Driven by strategy, influenced by research and sharpened by experience, our team develops the digital media mix and experimentation roadmap required to launch, maintain and profitably scale the online channel. While this includes the blocking and tackling, thinking creatively

about the big idea that can move the business and the brand forward is a critical component to the offering.

The analytics practice provides data warehousing, ETL and data visualization allowing for business analysts to explore and exploit opportunity for media optimization. Offering both packaged Tableau™ workbooks as well as custom development, our team builds data visualizations that are architected to surface deep data and make it actionable so to shorten experimentation cycles and reduces testing investments.

### WHAT MAKES THIS PARTNER UNIQUE

Trafficbuyer Digital provides proven leadership and obsessive execution. Our team focuses on the business challenges of a concentrated set of clients and we execute their business online. We excel at modeling the media mix and architecting the analytics and marketing automation required to surface deep data and make it actionable.

A business analyst culture coupled with a rich knowledge of the digital media space allows our team to partner with our clients and assist established businesses in scaling core offerings profitably as well as launch new business lines.

Our resources are our team members who are lead by four key partners. We believe we our partners are "Principals maintaining Principals".

### LEADERSHIP



**Andrew Wagner**  
Founder & CEO

"It starts with clearly defining the success event. That drives the strategy, the tactical media mix and the architecture to surface deep data and make it ac-

tionable. That is what delivers more efficient learning cycles for our clients and ultimately successful business models".

Andrew is the Chief Executive Officer of Trafficbuyer Digital, a firm he founded in 1999. His role focuses on ensuring he and his team provide a consistent commitment to delivering clear leadership, high touch service, rigorous execution and quantifiable value to each client.

Prior to founding Trafficbuyer Digital, Andrew assisted in directing the digital efforts at Venture Direct. His old economy experience includes over 12 years within the healthcare delivery space as a business analyst assisting organizations such as Mount Sinai Medical Center in developing insurance products, HealthFirst in developing managed care offerings in New York City and US Healthcare in building and maintaining a physician network in the New York market.

### MISSION STATEMENT

Lead our clients within the digital media and marketing automation space by delivering the strategy and execution required to shorten learning curves while building customer acquisition and engagement channels profitably - at scale.

### BRIEF COMPANY HISTORY

Founded in 1999, Trafficbuyer Digital entered the digital media space with the base mission to help companies execute their business models on the web. Our services included digital media strategy, planning, buying and campaign management services with a concentration in financial services marketing. We positioned ourselves as an extension of the client's marketing team to build customer acquisitions channels profitably and at scale leveraging all digital media offerings available in the space.

In 1999 those offerings were thin with media product such as CPM search on Google, CPC search on Overture.com and CPM on Looksmart, Excite and Lycos. Today we provide leadership in an extensive scope of media product across search, display and social disciplines.

**KEY PRODUCTS AND SERVICES OFFERED**

Senior marketers and their teams require vendors to participate as partners in any engagement awarded to that vendor. At Trafficbuyer Digital our commitment to our client's allows us to deliver against challenges in a manner that illustrates that our team is an extension of your key personnel.

With the culture of a boutique independent digital marketing agency, our close knit team is lead by four key principals who maintain principles of core leadership, clear strategy and rigorous execution. Energized by our culture, our team boasts long standing experience with world class brands in both B2B and B2C financial services executions.

Trafficbuyer Digital partners with businesses to bring the marketing leadership and execution required to launch, maintain and profitably scale business models online. Our core offering is segmented into two key practices; digital marketing and analytics.

The digital marketing practice provides digital media strategy, planning, buying and campaign management services. Driven by strategy, influenced by research and sharpened by experience, our team develops the digital media mix and experimentation roadmap required to launch, maintain and profitably scale the online channel. While this includes the blocking and tackling, thinking creatively about the big idea that can move the business and the brand forward is a critical component to the offering.

The analytics practice provides data warehousing, ETL and data visualization allowing for business analysts to explore and exploit opportunity for media optimization. Offering both packaged Tableau™ workbooks as well as custom development, our team builds data visualizations that are architected to surface deep data and make it actionable so to shorten experimentation cycles and reduces testing investments.



Andrew Wagner, CEO. With Bill Wreaks during the ceremony.

**HOW WE DELIVER VALUE TO FINANCIAL MARKETERS:** *Trafficbuyer Digital provides our clients leadership in the digital marketing space delivering the strategy and execution required to shorten learning curves while building customer acquisition and engagement and channels profitably - at scale.*

**WHAT CLIENTS ARE SAYING**

“ The leadership at Trafficbuyer Digital understands how to build models to define an explicit roadmap to executing and scaling a business profitably. The entire team is committed to the client. I wish all my vendors approached their commitment in the same manner ”

**Rich Smith, CMO, ditech**

**FOR MORE INFORMATION**

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**WILDE**  
Agency

“ we deliver superior results for some  
of the best brands around. ”

Wilde Agency creates digital and direct marketing campaigns driven by what behavioral scientists have proven about how people make decisions. And, we deliver superior results for some of the best brands around.

First, we look at your market and your customers' mindset from an analytical perspective, but data alone isn't enough. We then strategize how to influence your customers' decisions using proven principles of behavioral science.

Next we apply these behavioral science insights to your campaign strategies and creative concepts. Which means that every element in your campaign is created to trigger your customer to make that key decision in your favor. Your campaign activity is measured and used to continuously improve subsequent efforts.

#### MISSION STATEMENT

At Wilde Agency, we combine behavioral science with deep marketing expertise to consistently give our clients a measurable advantage.

#### WHAT MAKES THIS PARTNER UNIQUE

We combine deep marketing and technical expertise with the science of human behavior to consistently give our clients a measurable advantage. We take what social scientists and behavioral economists have proven about how people make decisions and use this to develop marketing communications that increase customer engagement and response in all channels, while supporting and extending your brand's reach.

This "Human Behavior Advantage" is the foundation of our approach, and it allows us to stand out and excel. It is woven into the fabric of every campaign we execute, and is an advantage you won't find at other agencies.

#### LEADERSHIP



**Nancy Harhut, CCO**

Getting people to take action is what Chief Creative Officer Nancy Harhut is all about. Her specialty is blending best-of-breed creative with behavioral science to prompt response. A frequent speaker at industry conferences, Nancy has shared her passion with audiences from Moscow (as the only American on the roster) to the U.S. Department of Defense (twice). Along the way, she's been named NEDMA Direct Marketer of the Year, Ad Club Top 100 Creative Influencer, and OMI Top 40 Digital Marketing Strategist, and she is an Andi Emerson Award recipient.

Prior to Wilde Agency, Nancy held senior creative management positions with Hill Holliday, Mullen, and Digitas. She and her teams have won over 150 awards for digital and direct marketing effectiveness.



**John Sisson,  
President**

President John Sisson is responsible for the agency's strategic vision and growth, and works regularly with leading marketers to help them achieve theirs.

As a creative and effective business development, marketing and product development professional, John has deep expertise in the financial services, education, software development and healthcare domains. He is an experienced strategist with a successful track record in business development and partner acquisition and management. As a leader in integrated marketing programs and multi-channel customer communications, John's focus is helping all our clients grow.

#### WE LIVE BY FIVE C'S...

- **Collaboration:** Working collectively with you, we gain an understanding of your marketing challenges to generate ideas that combat them.
- **Commitment:** We're committed to taking care of the details so you can focus on the rest of your undertakings. We make it easy for you.
- **Communication:** We offer an honest and transparent dialogue with ongoing progress updates, as well as a dedication to being on time and exceeding expectations.
- **Consistency:** We stay current on marketing best practices as they evolve. Ongoing adherence to those things that we know work is critical. We're experts at employing these techniques to get people to act.
- **Creativity:** We pride ourselves on creative that works. We're focused on your objectives, not just design for the sake of design.

### BRIEF COMPANY HISTORY

Incorporated in 1998, Wilde Agency is a nationally recognized and award-winning marketing agency headquartered in Westwood, MA. We partner with our clients to solve their most complex marketing communications challenges with smarts, sweat, and science.

The Wilde Agency team consists of experts across a variety of integrated marketing disciplines—including Account Services, Creative, Digital, and Analytics, and we have especially deep expertise in the financial services and insurance categories. Our team has an average of 15 years of experience working side-by-side with client teams to develop focused marketing strategies and campaigns that yield measurable results and actionable learning.

### KEY PRODUCTS AND SERVICES OFFERED

Wilde Agency is in a constant state of evolution to stay one step ahead of "What's Next." As an integrated marketing agency, we

specialize in all the core disciplines outlined below. We maintain strategic partnerships with industry leaders to provide full-service, seamless, and flawless execution across channels.

• Strategic planning • Integrated marketing • Analytics • Account management • Creative services • Print/production/media management

### SPECIFIC SERVICES INCLUDE:

Customer Experience Mapping, Marketing Plan Development, Audience/Segmentation Strategy, Test Strategy, Email Marketing, Marketing Automation, PURLs, Direct Mail, DRTV, Print, Out-of-Home, SEO, Social, Digital Strategy, User Experience, Design, Development, Content Management, Quality Assurance, Responsive Design, Hybrid Native Application Development, Content Strategy, Editorial Planning, Persona Creation, Audience Segmentation, Video, Copywriting, Measurement and Analysis, Attribution Modeling, Data Visualization, Competitive Analysis, Primary Research

### HOW WE DELIVER VALUE TO FINANCIAL MARKETERS:

*Wilde Agency blends best-of-breed direct and digital marketing with behavioral science. We leverage the power of what social scientists and behavioral economists reveal about how people make decisions. Because we integrate these insights across every marketing strategy, every channel and every initiative we execute, we consistently deliver superior results for our clients across acquisition, usage stimulation, retention and winback objectives.*

### WHAT CLIENTS ARE SAYING

“ Behavioral science is a powerful tool for increasing customer engagement and response, and Wilde Agency understands this. ”

**Dan Ariely**, co-founder of BEworks Inc; **James B. Duke**, Professor of Psychology and Behavioral Economics, Duke University



### FOR MORE INFORMATION

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# yext “ The world’s leading digital presence management company ”

Yext is the world’s leading digital presence management company, with a mission to help marketers perfect their location information in every hand, on every device. Our cloud-based software allows marketers to update their business locations’ listing information (address, store hours, photos, product lists, etc) on all the major sites, maps, and apps across the web in real-time.

As the world becomes increasingly saturated with smartphone devices, mobile-empowered customers expect accurate, rich, and hyper-localized information at their fingertips whenever and wherever they are. By investing in a strong digital presence, marketers ensure that searching customers always find what they’re looking for and are more likely to make it through your front door.

Enter Yext. Our proprietary API integrations with over 90 of the most prominent publishers worldwide, including Bing, Yahoo, Yelp, Facebook, Apple Maps, etc. enable marketers to update and enhance their listing content instantaneously for ten locations, or ten thousand, at just the click of a button.

And it works. More than 400,000 businesses – including dozens of Fortune 500 brands such as Citibank – use Yext to ensure their

brand information is consistent, tailored by location and updated in real time, now on a global level, to build better relationships with customers and inspire greater on and offline commerce.

## MISSION STATEMENT

Yext’s mission is to help deliver mobile customers to the doorstep of the world’s 50 million businesses by putting perfect location information in the hand of every consumer.

## BRIEF COMPANY HISTORY

Yext was founded in 2006 by Howard Lerman and Brian Distelburger and started off as a pay-per-call technology service (the technology won Tech Crunch Disrupt in 2009). But after scaling the business Howard and Brian soon recognized a much bigger opportunity in business listings management and spun off the pay-per-call company as Felix, sold it to IAC, and invested the money in PowerListings, the blockbuster product that catapulted Yext forward.

## WHAT MAKES THIS PARTNER UNIQUE

Yext’s founders were first to arrive in the space in 2011, and invested early on in building patented technology and exclusive partnerships with the most prominent publisher sites, such as Yahoo, Bing, Yelp, and Facebook, creating major barriers to entry. Through these exclusive partnerships, Yext was able to create advanced API integrations with the publishers, enabling Yext to power data directly to the publisher sites so marketers can manage and update the information, content and messaging on any or all locations in real-time, which is the company’s key differentiator.

## LEADERSHIP



**Howard Lerman,**  
Co-Founder & CEO

Founded Yext in 2006 with a single goal: to build an impactful, great company with super talented people.

Along the way, Yext has re-invented three industries: pay-per-call advertising, business listings synchronization, and today, digital presence management. With over 400 amazingly talented employees serving over 500,000 customers, Yext is on its way to realizing Howard’s original vision. Yext is Howard’s fourth software company. Howard is also Co-Founder and Chairman of Confide, a leading off-the-record messaging service.

Howard is a proud graduate of TJHSST and barely graduated from Duke University.



**Brian Distelburger,**  
Co-Founder & President

Also serves as a member of the Board of Directors. Brian has held a number of key leadership roles

throughout Yext’s history and currently runs Yext’s global enterprise division. Prior to founding Yext, Brian served in management positions at two Internet companies.

Brian also sits on the Board of Directors of Food Genius and the Cornell Entrepreneurship Advisory Council, and advises several NYC Tech startups.

Brian attended Cornell University and graduated without distinction.

## KEY PRODUCTS AND SERVICES OFFERED

Yext's digital presence management software offers a comprehensive product suite that helps marketers manage and update their geodata and promotional content across over 100 of the major map, search engine, and directory sites, including Apple, Bing, Facebook, Yelp and Yahoo. Exclusive API integrations with these publishers in Yext's PowerListings Network give marketers the ability to seamlessly manage and update their business information and content across one or all of their digital listings, at just the click of a button.

Yext's blockbuster product, Listings, is what allows marketers to control and optimize their business listings for each store location across the most prominent publishers worldwide. They can update basic information, such as name, address, and phone, as well as more enhanced content, such as photos, videos, and business descriptions. Yext also provides exclusive capabilities for enriching listings, such as enhanced content lists including menus, bios, product lists, etc., and featured messaging, which allows marketers to add a personalized call-to-action link to promoting local sales, special deals, product additions, and more to entice local customers.

Yext's suite also includes Location Manager, which stores businesses' geodata for every store location worldwide. The Social product lets marketers manage their brand's presence, post updates, and track reviews on social sites including Facebook, Foursquare and Google+. The Pages product leverages the data already stored in Listings to create local landing and campaign pages to optimize listings, improve SEO and drive more traffic. The final product, Analytics, gives Yext customers important insights into their listings engagement, including search impressions and profile views and clicks.

At the highest level, Yext's comprehensive product suite helps marketers leverage their online presence in order to get more customers through their businesses' front door. Using Yext's real-time control and API integrations in the PowerListings Network, brands can take control of their digital presence to make sure their information is updated, accurate and optimized across any of the search portals where customers are searching. Not only is a more complete listing with rich content more engaging for the searcher, but it also improves SEO and search ranking in organic search results, making it more likely that a searcher not only finds your listing, but chooses it.

### HOW WE DELIVER VALUE TO FINANCIAL MARKETERS:

*Yext is the global Digital Presence Management (DPM) leader, helping over 500,000 businesses manage their location and promotional data across 100+ map, app, search engine, and directory partners including Apple, Bing, Facebook, Foursquare, Yahoo, and Yelp.*



### FOR MORE INFORMATION

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## About The Gramercy Institute



The world of financial marketing and communications is evolving—at lightning speed. The Gramercy Institute keeps financial brands on the cutting edge of this fast changing world so that they don't just keep up—they lead the pack.

We are the Gramercy Institute. Founded in 2002, the Gramercy Institute is the world's leading think tank for senior financial marketers and communicators. Our membership is comprised exclusively of the world's best known and most innovative financial brands. Our mission is to deliver deep, practical industry insight to financial marketers and communicators through the sharing of best practice strategies and tactics.

This mission is delivered in a variety of ways, the centerpiece of which is a series of Gramercy Forums that takes place (20 each

year) in world financial hubs: Boston, Chicago, Hong Kong, London, New York, Philadelphia, San Francisco and Toronto. Half of these forums take place in New York. GI also hosts group research dinners, summits and in 2016 begins a Master Class series.

Gramercy Institute further raises the industry bar through a number of separate award programs honoring financial marketing and communications excellence in strategy, partnership, reputation management and leadership.

Gramercy Institute's membership is by-invitation only and is comprised exclusively of the world's best known and most highly-regarded financial brands. As such, our true north is the very best interest of our industry and those marketing and communications teams that comprise it.

### Is your financial brand a Gramercy Institute member?

If you would like to request membership information or learn more about the Gramercy Institute and ways that your marketing or communications team can benefit from participation, contact us.

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