

ELEVATE

YOUR BRAND AT EVERY OPPORTUNITY

A HIGHER DEGREE OF IMPACT FOR ALL COLLATERAL

Every interaction is a chance to make a great impression, so make them count. TE+A's Collateral 360° ensures your materials reflect your brand in a consistent and professional manner; casting the best light on all aspects of your firm. COLLATERAL 360° examines your communication materials in a strategic and holistic manner. We dig into your sales process, go-to-market tactics and client communications to identify weak links and areas for improvement. A plan is implemented to improve efficiencies and effectiveness based on your needs.

GOTTA LOOK SHARP.

Make every interaction work to its full potential... we'll show you how.

SUPERIOR QUALITY & DESIGN AT A BETTER PRICE.

BRANDING

FROM YOUR CORPORATE ID TO YOUR PROSPECT & CLIENT MATERIALS, WE RAISE THE BAR AND SET STANDARDS TO ENSURE YOUR BRAND IS ALWAYS CONSISTENT ACROSS ALL CHANNELS.



BRAND STANDARDS GUIDELINES

Get it right everytime. We empower you with a set of standards, including corporate colors, fonts and logo usage.



PERFORMANCE REPORTS

Monthly and quarterly performance reports are important client pieces. We make yours reflect the care and effort you put into your investing.



PROSPECT PRESENTATIONS

You spend a lot of time and effort attracting new prospects. We ensure your closing efforts are supported with materials that do your firm justice.



ONBOARDING DOCUMENTATION

We help you streamline your onboarding process. From fillable PDFs to CRM integration, we make the process easy for clients and more efficient.



INVESTOR RELATIONS

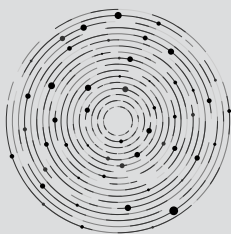
From newsletters to educational materials to event invitations, we create materials that rise to the top and get noticed.

UTILIZATION

WE EXAMINE YOUR CURRENT SALES AND CLIENT COMMUNICATION FLOWS TO IDENTIFY NEEDED IMPROVEMENTS AND ESTABLISH A METHODOLOGY TO BEST SUPPORT YOUR EFFORTS.

REPRODUCTION

OUR APPROACH ALLOWS YOU TO GAIN ECONOMIES OF SCALE AND LEVERAGE INTERNAL RESOURCES. LOOKING YOUR BEST DOESN'T HAVE TO MEAN SPENDING A FORTUNE.



SHINE ON...

LET US SHOW YOU A COUPLE OF OUR COLLATERAL PROGRAMS CONTACT BRAD AT...
BF@TRUNGALEEGAN.COM

We are proud to be recognized as a top TD Ameritrade Affinity Partner. Ask us about our Special Discount on all services for all TD Ameritrade advisors.