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## BRANDING & IDENTITY GUIDE: Addendum

# Why is Brand Important

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Every communication about Retirement Solution Group is an opportunity to express our brand. It is one more way we can build relationship and reinforce loyalty.

Brand elements act as a type of shorthand that ensures we are recognized and readily identified by clients, suppliers, and the general public. Extensive strategic planning is involved in the creation of a successful brand. It is essential to communicate a good deal of information, through a very small vehicle; a dozen words, an iconic graphic, and a palette of colors and fonts.

Effective communication can help build our credibility by describing who we are, what we can do, and what services we provide, and - maybe most importantly - the outstanding results we have already achieved.

Everything we say and do establishes our brand. It's not just using the right letterhead, fonts, and colors; it is how we answer the phone, the language, tone, and style we use in letters and emails; how quickly and accurately we respond to a request; how informative and professional we are - each interaction with the public can reinforce (or undermine) our brand image. Our brand - and how we communicate it - should be clear, concise, and consistent.

We have established these standards as a source of guidance and insight for creating unified, consistent communications that connect with our audiences and send the appropriate messages. These standards are your compass - a tool for helping you make good decisions as you create, produce, articulate and represent Retirement Solution Group (RSG) communications.

## **By adhering to these standards, we create powerful communications that:**

- Build a distinctive and memorable impression
- Establish a consistent voice
- Communicate practical, relevant, and essential information
- Ensure that essential core values are the foundation of every message that carries our name
- Cultivate and reinforce our image as a large, well-established organization

## **A strong brand will make people more likely to:**

- Recognize our individual identity within a multi-faceted group
- Recommend our company because we have credibility
- Perceive higher quality and value
- Recommend or search for our company as a place to work

## **We suggest that you:**

- Browse through these guidelines to get acquainted
- Print these guidelines and keep them handy, referring to them frequently
- Contact the Marketing Committee with any questions at **[info@retirementsolutiongroup.com](mailto:info@retirementsolutiongroup.com)**

## Type Face

### Usage Guidelines

The way you handle type is as much a part of your design as the images you choose or how you use a Retirement Solution Group. design template. Good typography reinforces an image of quality and value in Retirement Solution Group's message. Suggested usage guidelines are as follows:

- Use specified fonts. This will guarantee a consistent, professional look across our communications.
  - Headlines: Libby font family (Bold and Regular)
  - Body copy: Nunito Sans font family.
- Use initial caps and lowercase type for body copy. Type that is all uppercase is more difficult to read, and in some instances, yells at the reader.
- Do not distort type
- Do not use extra letter spacing in titles, headlines, or body copy
- Use system fonts (i.e., versions that come with your operating system like Open Sans) for the following:
  - creating documents for general office use such as internal memos, letters, faxes
  - printing documents to an on-site printer in your office environment
  - creating documents that will be sent electronically

Libby has been chosen for Retirement Solution Group as part of the original branding. The Libby fonts are reminiscent of handwritten print used in architectural drawing and detailed financial work. Libby will be used in titles and headlines only. Nunito Sans will be used in all body copy, forms and PowerPoint Presentation Templates, as well as for key messages. In addition, Nunito will be used for all business correspondence and internal communications. It's variant, Nunito Sans Bold, may be used in headings.

## Libby and Nunito Sans

LIBBY | REGULAR  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
01234456789

LIBBY | BOLD  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
01234456789

LIBBY | HEAVY  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
01234456789

Nunito Sans | Regular  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
01234456789

Nunito Sans | Bold  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
01234456789

Nunito Sans | Light  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
01234456789

*Although not preferred, the Microsoft default of Open Sans may be used on correspondence and emails or when Nunito Sans is not available:*

Open Sans | Regular  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
01234456789

Open Sans | Bold  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
01234456789

Open Sans | Italic  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
01234456789

# Email Signature

## Email Signatures

In addition to adhering to Retirement Solution Group electronic communications policy, it is important that you adhere to the following standards for email signature compliance for both desktop and mobile email:

Limit your signature line to the following:

- Approved email signature template
- Approved association/award badges
- Approved privacy/disclosure statement

Do not include additional information in your email signature, for example:

- Personal slogans, sayings, quotations, or verses
- Graphics other than the logo or approved badge
- Wallpapers, color backgrounds, or decorative fonts

Do not include prefixes in your email signature (e.g. Dr., Mr., Ms.). If adding credentials to your name, place after your last name.

## Approved Email Signature | Advisory



### First Last, Credentials

Title at **RSG Advisory**  
o: 866.352.7731 x#### | name@rsgadvisory.net  
Chicago, IL | Portsmouth, NH  
www.rsgadvisory.net

Securities are offered through LPL Financial, member FINRA/SIPC. RSG Advisory and LPL Financial are separate, non-affiliated entities. Investment advisory services offered through Global Retirement Partners, LLC dba DBA RSG Advisory, an SEC registered investment advisor.

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## Approved Email Signature:



### First Last, Credentials

Partner at **Retirement Solution Group**  
o: 866.352.7731 x210 | steve@retirementsolutiongroup.com  
Chicago, IL | Portsmouth, NH | West Palm Beach, FL  
www.retirementsolutiongroup.com



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## Approved Mobile Email Signature:

Remember to set your RSG signature message on your mobile phone. It should be a shortened version following the sample below, 4 lines long.

### First Last

m: ###.###.####

e: emailaddress@retirementsolutiongroup.com

www.retirementsolutiongroup.com

Instructions & assistance to set up email signatures are available from the Marketing Committee or Team Leads.

NOTE: The size of the any badges should be no taller than the RSG the logo.