



BRAND & MESSAGING UPDATE

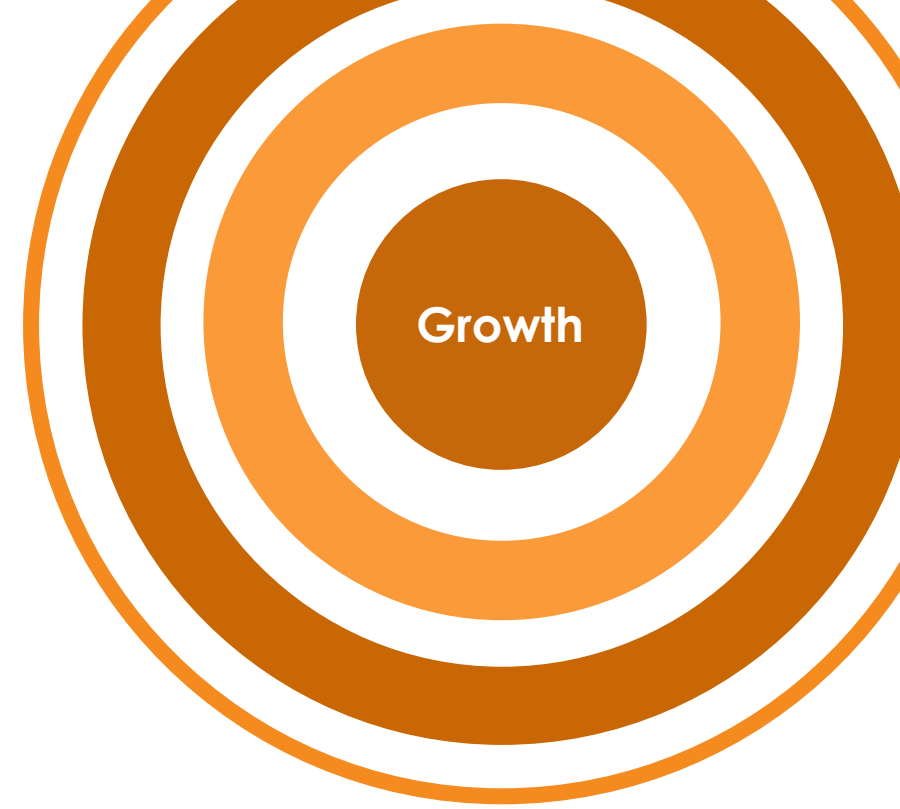
Positioning the Carson Group Companies

April 27, 2017

WHY NEW MESSAGING?

We set out to...

- 1 Establish and simplify the Carson Group story
- 2 Institute consistency across Carson brands
- 3 Engage more advisors
- 4 Increase conversions



advise investors
At our core, we *partner with advisors* for growth.
coach advisors

OUR MTP

Massive Transformative Purpose



Be the most trusted for financial advice



PUTTING IT ALL TOGETHER

Carson Group Messaging



Coaching and partnership to grow
your business



We take the guesswork out of growth. We give you a tested plan and accountability that guarantees results.

We make the complex simple for financial advisors. We do your marketing, compliance, technology, investment management and operations. You do more of what you love.



Our advisors are just as good at explaining investments as they are at making them:

- ✓ Straightforward fees
- ✓ An effective game plan
- ✓ Advice in common language

TODAY

House of Brands



CARSON GROUP



FUTURE

Branded House



CARSON GROUP



CARSON GROUP
PARTNERS



CARSON GROUP
COACHING