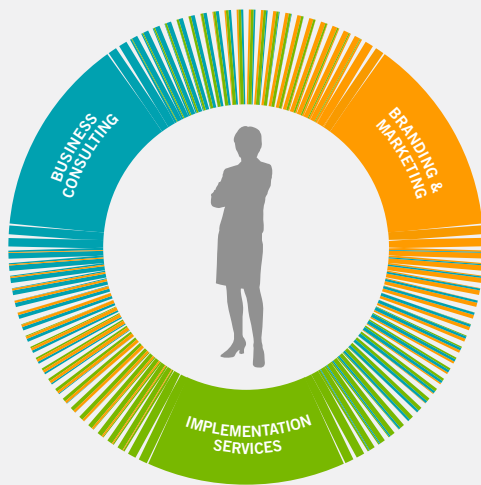


# Business Strategy. Creative Marketing. Real Results.

## From insight to action

Insights based on industry experience.  
Actionable solutions to drive your business forward.



In every engagement, we draw on our broad expertise to develop a holistic view that considers how an initiative impacts your company's business strategy, corporate brand and customer experience.

We have firsthand knowledge of the challenges our clients face, because we have faced them ourselves. Members of the Carpenter Group team have spent years at financial services firms leading strategy, marketing and creative teams.

To this insider's understanding we bring an outsider's objectivity by drawing on resident expertise in such areas as strategic planning, branding user experience, information design and multi-channel marketing.

Our unique perspective enables us to look across and beyond the financial services industry to identify emerging trends, best practices and areas of untapped opportunity.

### BUSINESS CONSULTING

Business Strategy  
Process Engineering

Our consulting services begin with a thorough understanding of the challenges you face — in the marketplace and within your organization. We bring expertise and objectivity to meet your goals at the corporate, business unit and product-line levels.

### BRANDING & MARKETING

Communications Strategy  
User Experience

Connecting with your audiences — financial intermediaries, retail or institutional clients, other business partners and internal teams — requires understanding their values, expectations and behaviors. We develop integrated communications programs that address audience realities and help drive behavior.

### IMPLEMENTATION SERVICES

Creative Execution  
Technology Consultation

We bring strategy and concepts to life through flawless execution of craft combined with a deep knowledge of the technology and resources needed to create it.

## Three decades of experience

We have the experience to solve the challenges of today and tomorrow. For nearly 30 years, Carpenter Group's professionals have helped clients successfully launch and grow their businesses, build market share and expand their customer base. Today, our client partners span the financial services industry: from asset management to insurance to banking.

### WHAT WE KNOW

Mutual Funds & ETFs  
Retirement Plans  
Institutional Asset Management  
Alternative Investments  
Separately Managed Accounts & UMAs  
Financial Planning & Estate Planning  
Variable and Fixed Annuities  
Life Products & Long-Term Care  
Property & Casualty  
Health Care

## Solutions that work

From business strategy and brand development to communications audits and high impact sales tools, our solutions are designed to drive your business forward.

### WHAT WE DO FOR YOU

Vision & Strategy  
Market Assessment  
Client Experience  
Brand Development  
Messaging & Editorial  
Integrated Marketing Programs  
Technology-Enabled Solutions

A full client list and select case studies are available at [www.carpenternyc.com](http://www.carpenternyc.com)

carpenter group



Business Consulting  
Branding & Marketing

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