

Take Center Stage

With a financial package that inspires confidence.

What a great opportunity – financial packages that show off your services. With so many planning specialists and financial institutions competing for treasured clients, you can make an impressive statement by producing an eye-catching brochure, an informative financial planning guide and a financial statement.



Xerox® Color C60/C70 Printer



Xerox® D Series Copier/Printer

The Opportunity

An attractive, eye-catching, interesting package is key to capturing the attention of prospects – and the business of clients. Full-color brochures are the perfect vehicle to introduce your capabilities, inspiring prospects to become clients who turn their finances over to you to protect, invest and grow.

The financial plans you distribute convey so much about your financial institution and your services. They show you take your role as a trusted advisor very seriously. You care about the content of the plan, the quality with which it is produced, the funds clients entrust you to protect and the dreams clients hope to realize – with your knowledge and insights.

And since financial institutions like yours are always in communication with clients – providing ongoing services, billing them regularly and receiving payment – financial statements are perfect for sending targeted marketing messages month after month, year after year.

Take a look at the Offerings Brochure and the Financial Planning Guide from DeWalt Wealth Management Services as well as the account statement from Evolvcom for inspiration. Your financial package can take center stage!

The Xerox Advantage

To produce your financial package, pairing the Xerox® Color C60/C70 Printer and the Xerox® D Series Copier/Printer or Printer makes great financial sense. You gain greater flexibility from high-value color, low-cost monochrome, quality reproduction of text and images, polished professional output and a range of inline finishing choices on a variety of media.

Financial Package Application Brief

You'll see how easy it is to upsell or cross-sell products and services, educate your prospects and clients, combine direct-marketing and statement mailings, and strengthen relationships with clients. Your financial package is sure to distinguish you from the competition – and that's great for business.

Production Notes

When financial institutions and planning specialists contact prospects and transform them into clients, a best-in-class package is key. Attention-getting color and economical black-and-white printing of brochures, plans and account statements can really make a difference.

Workflow / Software:

Adobe® InDesign® CS5

Print Engine:

Color pages – Xerox® Color C60/C70 Printer

Monochrome pages – Xerox® D Series Copier/
Printer or Printer

Finishing / Finished Size:

11 x 17 in. / A3 duplex, folded (brochure and plan)

8.5 x 11 in. / A4 duplex (account statement)

Number of Pages:

Brochure – 4 color pages

Guide – 4 color pages, 8 monochrome pages

Statement – 2 monochrome pages

Media:

Xerox® digitally optimized paper

1 The DeWalt Wealth Management Services Offering Brochure includes full-color images and a back cover with easy-to-read contact information.

2 The DeWalt Wealth Management Services Offering Financial Planning Guide includes full-color front and back covers with black-and-white inside pages that include grayscale charts and tables.

3 The Financial Statement includes client-specific information, an itemized list of charges, a detachable form, account information, terms and conditions, and a targeted message with variable data.

