

**AUTHENTICITY, PROBLEM-SOLVING AND RELATIONSHIPS** are what sets Chartwell Agency apart in the financial services arena. We focus on the marketing activities that drive organizational growth by using the communications strategies to help ensure long-term relationships with your clients and members. We are passionate and experienced in the financial industry and understand the challenges and opportunities you are faced with every day. Because of that, we make a difference and, as an extension of your team, help guide you every step of the way.



### Shift<sup>SM</sup>

Moving forward with peace of mind.

#### Switch/Transition Campaigns

The process for switching financial institutions can be daunting and overwhelming to consumers so Chartwell assists with top-of-mind marketing to engage your new clients/members.



### Insider<sup>SM</sup>

Getting everyone on the same page.

#### Internal Communications

Chartwell creates short- and long-term plans to consistently communicate with staff, one of the most critical constituents, through a variety of marketing and event efforts.



### Allied<sup>SM</sup>

Stronger together.

#### Cross Selling/Upselling

Our carefully crafted and appropriately timed cross-selling and upselling strategies and drip campaigns can dramatically improve customer retention rates.



### Bespoke<sup>SM</sup>

Personally crafted communications for the Millennial market.

#### Millennial Marketing

Chartwell's program helps to ensure your financial institution's communication to Millennials is relevant and customized to meet the diverse interests and needs of this group.



### Launch<sup>SM</sup>

Boarding has commenced to propel your services.

#### OnBoarding & ReBoarding

Chartwell's program can help you effectively introduce new clients/members to all your services within their first 90-day "honeymoon period" and/or re-engage current clients/members to enhance your retention and your revenue.



### Porch<sup>SM</sup>

We're with you every step of the way. Making your new house a home.

#### New Movers

Chartwell's New Movers campaigns help you connect with residents who are moving into your market or just across town as they look for and set new habits for managing their financial needs.

our services

- facilitation & training
- public relations
- marketing
- digital media
- crisis communications

our industries

- health care
- financial
- education



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connect communicate captivate



Blueprint<sup>SM</sup>

Strategic architecture for a solid foundation.

Organizational Strategic/  
Marketing Planning

Chartwell's unique abilities are understanding clients' needs, offerings and markets and providing a strategic and/or marketing plan that addresses organizational goals and implementable tactics to meet – and exceed – them.



Affinity<sup>SM</sup>

You're only a stranger once.

Centers of Influence and  
Outreach Planning

Chartwell's Affinity program provides ongoing efforts to stay in front of targeted audiences with the appropriate messaging to make a positive impact in your company.



Scout<sup>SM</sup>

Discovering & conquering new markets.

M&A/New Geographic  
Market Growth

Chartwell offers specific strategies around messaging, timing and implementation to assist organizations with their pre- and post-market growth messaging and branding.



Hatch<sup>SM</sup>

Cultivate & grow your financial future.

Loan Generation/Loan Growth/  
Portfolio Enhancement

Using credit pre-screens and coordinating quality messages in appropriate timing, we create loan generation marketing campaigns to help you create deeper relationships to generate attention and income.



Boost<sup>SM</sup>

Lifting your team above the competition.

Leadership Development

Chartwell recognizes that investing in current staff provides both immediate and long-term ROI to you and has developed a professional development program that provides training on key topics/issues most relevant to grow your next level of leadership.

CHARTWELL  
 AGENCY WILL  
 HELP GUIDE YOU  
 EVERY STEP OF  
 THE WAY.