



BRAND CONTENT STYLE GUIDELINES





Brand Content Style Guidelines

I. BRAND BASICS

Our Brand name is **Dupree Financial Group**. Do not abbreviate, lowercase or combine words when typing it out.

Brand Website: Dupreefinancial.com

Primary marketing vehicle: We currently get customers from our radio show, The Tom Dupree Show ([iTunes](#) / [Website](#)). Transcriptions from this radio show have the potential to make for good content. I use [Otter](#) to transcribe weekly. Some shows are more appropriate and suitable for content than others.

We have received a significant amount of our assets under management from our radio advertising and radio show. The Tom Dupree Show has increased our legitimacy and often speeds up the conversion process.

We have a track record of converting 7 out of 10 appointments with people we meet in person. After signing on as a client, the average retention time is 12 years. We are fee-based and charge an average of 1% for assets under management.

At the beginning of the Covid-19 pandemic, we experimented with a video webinar through a Facebook campaign. The ROI was disappointing, possibly due to the timing. However, we received 165 leads that we are still nurturing.

NOTE: We have not explored LinkedIn to any great extent. I believe that is an untapped resource for us.

II. WHO WE ARE

1. Who Are We? Dupree Financial Group is a third-generation investment business with 45 years of experience under our belts.

We are led by Tom Dupree, who founded Dupree Financial Group in 2003. Tom Dupree established Dupree Financial Group on the principle that creating long-term relationships with people — not just their money — is the key to successful wealth management.

The bond between our team and our clients is crucial. We go the extra step and really get to know who we are working with in order to guide them in the right direction, no matter what life throws their way.

2. What Do We Do? As Fiduciaries, we provide financial advice based on our client's goals. We achieve this through research that we conduct personally.

That means diving deep into annual reports, talking to decision-makers, and even visiting in person to get a feel for the place. It also means no outsourcing of our research—it's all done right here at our office in Lexington.

We keep things done the old-fashioned way: in-house and in-depth. We dig deep into our findings to ensure we have the right companies to invest in on our client's behalf.

We pride ourselves on keeping our clients informed and educated about their financial decisions. They know where their money is going and why at all times.

We also plan ahead. We intend to be working with all of our clients for years to come, so we have a long-lasting game plan for their financial goals.

Our goal is not only to assist our clients but actually teach them financial literacy and provide them with the ability to understand their investments. As fear is prevalent in the market, we update our clients regularly.

No mysteries or smoke and mirrors—just transparency, honesty, and a level of understanding to help our clients sleep better at night.

Our services include:

- Individual and Joint Investments Accounts
- 401K Rollover/ 403B/ 403B in-service rollover
- Roth IRA
- Traditional IRA
- Portfolio Review

3. What is at the Heart of Everything We Do? Customer Service is at the heart of what we do.

We promise to put our clients first, keep them consistently informed, and help them make their dream lives a reality. We guide our clients through the entire process, so they truly understand where they're investing their money.

If something isn't working, we're not afraid of modifying it. The market is constantly changing. That's why we don't believe in set-it-and-forget-it investments. We're continuously evaluating how our investments work for our clients and searching for new ways to improve.

Example of the “heart” of Dupree: 60-second ad spot.

This brings in a lot of leads for Dupree Financial Group. [Listen to the file here.](#)

Speaker1: [00:00:00] Hi. This is Tom Dupree. I've spent 44 years in the investment business. A few times in those 44 years, I have regarded certain things in the market as having incredible value. Over the course of my career. I've been right about these things more often than I've been wrong. Right now is one of those times. Usually such a time is difficult to identify because along with it is a large amount of media coverage telling you that you should be afraid rather than bold. It is my experience that at such times you should deny your impulse to be afraid and act. It's also my experience that action is better than inaction. If you'd like us to examine your investment portfolio call the Dupree Financial Group at 8592330 400. And be sure to listen to the Tom Dupree Show Saturday morning from 6am to 7am at Newsradio 630 p.

4. What is our Content Differentiation Factor (CDF)? We stop at nothing to empower and educate our clients in order to make their financial dreams a reality. Our secret factor is not only the 45 years of experience in the financial industry but the intensive research we put into each investment. That means diving deep into annual reports, talking to decision-makers, and even visiting in person to get a feel for the place. It also means no outsourcing of our research—it's all done right here at our office in Lexington. Not only do we find the best investments for our clients, but we ensure that they understand where their money is going and why at all times. Knowledge is power, and that is what we want to provide to every individual that works with the Dupree Financial Group.

5. What Makes Our Brand Voice Unique? Authenticity. We are relatively easy to understand but still slightly sophisticated.

EXAMPLE OF CDF -

Content Written by Elizabeth Dupree

Do you ask stupid questions?

Probably not!

Investors should be skeptical. They should ask their Investment Advisor more questions!

Investment Advisors sometimes make customers feel that the investment business is “just too big for them to understand.”

The investor thinks “Just punt and trust that these guys know what they are doing.”

Big mistake!

- ✓ You are smart enough to understand what is going on with your investments.
- ✓ You were smart enough to make this money!
- ✓ You were smart enough to save this money.
- ✓ This is your money!

At Dupree Financial Group, We love it when our clients grill us.

We enjoy what we do in the investment business and we love talking about it!

We are not afraid of the questions because we do our own research-in-house and in-depth.

- We can tell you exactly what we have learned about a company we are invested in.
- Why we own the stock.
- Why we might want sell it.

Whoever is managing your life savings should not be afraid of your questions.

You should not feel intimidated to ask questions.

Your Investment Advisor should be able to answer your questions clearly.

You should also be able to look at every angle of your portfolio and have confidence in what you are invested in and have confidence that you understand those investments.

That Investment Advisor works for YOU!

You should not feel honored that your Investment Advisor is willing to talk to you or feel honored to be in their presence.

That firm should be honored to work for YOU!
There are no stupid questions!

SKEPTICISM

Are you always a skeptical person?

Well... you should be!

You should have a healthy dose of skepticism when it comes to your investments.
Ask questions!

There are no stupid questions about your investments...about the money you have worked so hard to save!

Investment Advisors should be able to explain your investments on a level that educates and empowers YOU!

We believe that is our job at Dupree Financial Group.

We are always learning...about companies, sectors and industries.

We want to educate you about your investments- because knowledge is power!

We want to convey that knowledge to you...Because it is your money we are investing for you!

You need to feel comfortable that you know exactly what is going on with your investments.

It is our role to research and create the portfolio and then to educate and empower you about the WHY.

REVISION!!!

INVESTORS BEWARE.

Investors should be skeptical.

They should ask their Investment Advisor more questions!

Investment Advisors sometimes make customers feel that the investment business is “just too big for them to understand.”

The investor thinks “Just punt and trust that these guys know what they are doing.”

Big mistake!

- ✓ You are smart enough to understand what is going on with your investments.
- ✓ You were smart enough to make this money!
- ✓ You were smart enough to save this money.
- ✓ This is your money!

At Dupree Financial Group, We love it when our clients grill us.

We enjoy what we do in the investment business and we love talking about it!

We are not afraid of the questions because we do our own research-in-house and in-depth.

- We can tell you exactly what we have learned about a company we are invested in.
- Why we own the stock.
- Why we might want to sell it.

Whoever is managing your life savings should not be afraid of your questions.

You should not feel intimidated to ask questions.

Your Investment Advisor should be able to answer your questions clearly.

You should also be able to look at every angle of your portfolio and know what you are invested in and have confidence that you understand those investments.

That Investment Advisor works for YOU!

You should not feel honored that your Investment Advisor is willing to talk to you or feel honored to be in their presence.

That firm should be honored to work for YOU!

There are no stupid questions!

6. What is Our Process? We do everything as a team, which means our customers benefit from all our brains—not just one person. Clients can schedule a consultation through our website or by calling us directly. During the appointment, a portfolio review is conducted. Sometimes a prospect will open an account right there on the spot. If that is not the case, we will move on to a portfolio allocation for them to review at the next meeting. After this, the individual decides if they would like to open an account with us.

III. OUR BRAND'S CONTENT STYLE

Simple, direct, fun, informative, industry-leading, educational, upbeat and creative. Our core services deliver the expertise of Tom Dupree, a seasoned expert with over four decades of experience in the financial industry.

Simple: This should be legible to the average reader. If they can't understand our sentence the first time, rewrite it.

Direct: We are clear on our message and get straight to the point.

Fun: Our listeners and clients feel like family friends after listening to our podcast. We share our stories and our lives with them, and in doing so, we create a bond that goes beyond the page or screen. We become their confidants, their friends, and their advocates.

Informative: We are thorough with all of the information we publish. When talking about statistical information, we are transparent in our research process and have the sources to back it up.

Industry-Leading: We aim to be the best of the best in every piece of content we post. We stay current and relevant to what's going on in the now.

Educational: We want our audience to walk away with a feeling of financial literacy.

Upbeat: We are witty and approachable without sacrificing the quality of our content.

Creative: We remain fresh and innovative with our ideas. We are happy to think outside of the box to create compelling content.

IMPORTANT CONTENT RULE: *Due to the nature of our financial content, our compliance department will have to take a glance at all content created until there is a comfort level with the writer. The only absolute no-no is using words that make any inference to a guarantee of any kind. The word "can" eliminates a guarantee often. Ex. Produces yields of... vs. can produce yields of...*

If Dupree Financial Group Was a Movie Character

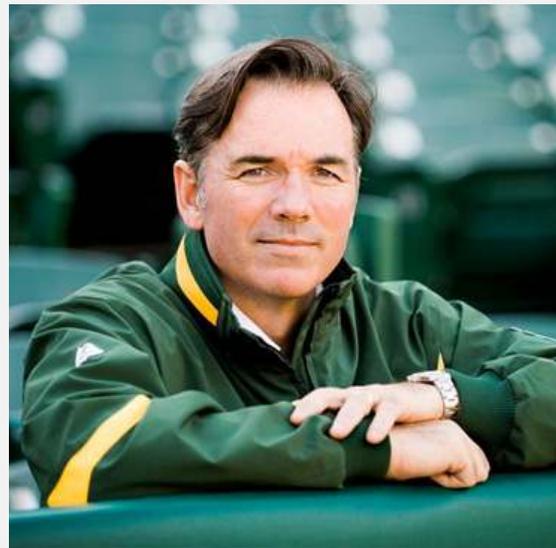
BILLY BEANE

Movie: Moneyball

Billy is an expert in his field and has loved baseball since he was a child. He is confident, competent, and competitive. He's forward and cuts right to the chase giving clear information with no fluff. He thinks out of the box and is willing to consider ideas that other industry leaders close their minds to. This is Dupree Financial Group as a brand.



(Movie character)



(Real Billy Beane)



ROCKY BALBOA

Movie: Rocky

Rocky is determined to put in the work no matter the odds. He has heart, courage and genuinely cares about his craft. He is willing to do whatever it takes to make his dreams become a reality. Rocky is how Dupree Financial Group shows up for our clients. We are always prepared to do our absolute best to ensure our clients are educated and supported in each financial decision.

Sources: Content Hacker ([Blog](#)) - We want to carry over financial education to our readers with an entertaining, enjoyable tone of voice in our content. Content Hacker's blog is a good model of this, even if it's in another industry.

Content to Link to: Dupree Financial Group podcast ([Website](#)).

IV. LOGO USAGE RULES

Logo: We have two logo variations: Green and white with a rectangle frame and a text-only logo available in white and green.

Use of Logo: The green and white logo with the rectangle frame is the primary logo. You should use this logo in all cases possible unless shape, color or length creates an issue.

The text-only logo available in white and green is the secondary logo. You should use this logo if there is an issue with the primary logo. You should not use this logo if shape, color or length creates an issue.

Visuals: Do not compromise the overall look of the logo by rotating, skewing or distorting in any way- that includes adding unnecessary and unattractive text decorations like drop shadows and outlines.

Never:

- Rotate the logo
- Squash or stretch the logo
- Place elements in the logo
- Change the shape of the logo
- Create compositions that are not already provided
- Use a pixelated logo
- Use off-brand colors
- Add drop shadows or other text styles
- Contain the logo in a box when used in a background

LOGO

TYPOGRAPHY

LOGO FONTS

CORMORANT
REGULAR

Aa Bb Cc Dd Ee Ff Gg Hh Ii Jj Kk Ll Mm Nn Oo Pp Qq Rr Ss Tt
Uu Vv Ww Xx Yy Zz
1 2 3 4 5 6 7 8 9 0

LATO
REGULAR

Aa Bb Cc Dd Ee Ff Gg Hh Ii Jj Kk Ll Mm Nn Oo Pp Qq Rr Ss Tt
Uu Vv Ww Xx Yy Zz
1 2 3 4 5 6 7 8 9 0



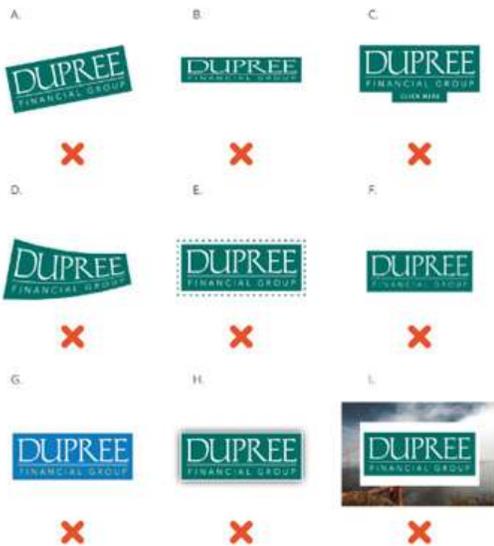
PRIMARY LOGO

This is the primary version of the logo. It should be used in all cases possible, unless shape, background color, or length create an issue.



LOGO

UNACCEPTABLE USAGE



A few rules are necessary for maintaining the integrity of the brand. Don't compromise the overall look of the logo by rotating, skewing, or distorting in any way - that includes adding unnecessary and unattractive text decorations like drop shadows and outlines. Here are a few examples of some ways you should NEVER ever consider using the logo.

- A. Don't rotate the logo
- B. Don't squash or stretch.
- C. Don't place elements in the logo.
- D. Don't change the logo's shape.
- E. Don't create compositions that are not already provided.
- F. Don't use pixelated logo
- G. Don't use off-brand colors. Reference the Color Scheme section.
- H. Don't add dropshadows or other text styles.
- I. Don't contain the logo in a box when used in a background.

SECONDARY LOGO

This is the secondary version of the logo. It should be used in all cases possible, unless shape, background color, or length create an issue.



TYPOGRAPHY

CROSS PLATFORM FONT OPTIONS

HEADER FONT

LIBRE BASKERVILLE
REGULAR

Aa Bb Cc Dd Ee Ff Gg Hh Ii Jj Kk Ll Mm Nn Oo Pp Qq
Rr Ss Tt Uu Vv Ww Xx Yy Zz
1 2 3 4 5 6 7 8 9 0

SECONDARY FONT

OPEN SANS
REGULAR

Aa Bb Cc Dd Ee Ff Gg Hh Ii Jj Kk Ll Mm Nn Oo Pp Qq Rr Ss Tt
Uu Vv Ww Xx Yy Zz
1 2 3 4 5 6 7 8 9 0

BODY FONT

LORA
REGULAR

Aa Bb Cc Dd Ee Ff Gg Hh Ii Jj Kk Ll Mm Nn Oo Pp Qq Rr Ss
Tt Uu Vv Ww Xx Yy Zz
1 2 3 4 5 6 7 8 9 0

COLOR

SCHEME

In color theory, a color scheme is the choice of colors used in design for a range of media.



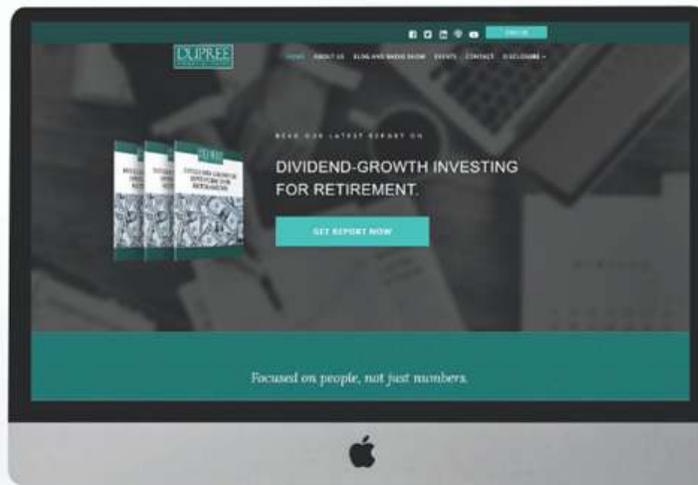
MARKETING MATERIALS

PRINTS (MOCKUP)



MARKETING MATERIALS

WEBSITE (MOCKUP)



SOCIAL MEDIA

COVERPHOTOS AND BANNERS

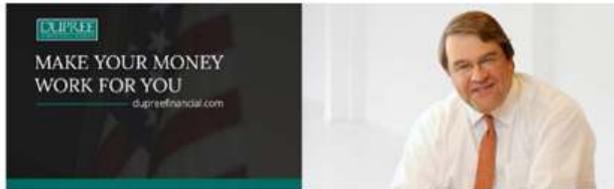
FACEBOOK PAGE
COVERPHOTO



TWITTER BANNER



LINKEDIN BANNER





DUPREE FINANCIAL GROUP

BRAND GUIDELINES

Tom Dupree, Jr. founded Dupree Financial Group on the principle that creating long-term relationships with people – not just their money – is the key to successful wealth management.

The bond between our team and our clients is a crucial one. When we really get to know you and your priorities, we can guide you in the right direction no matter where life takes you.

IF YOU WANT A TEAM ON YOUR SIDE...

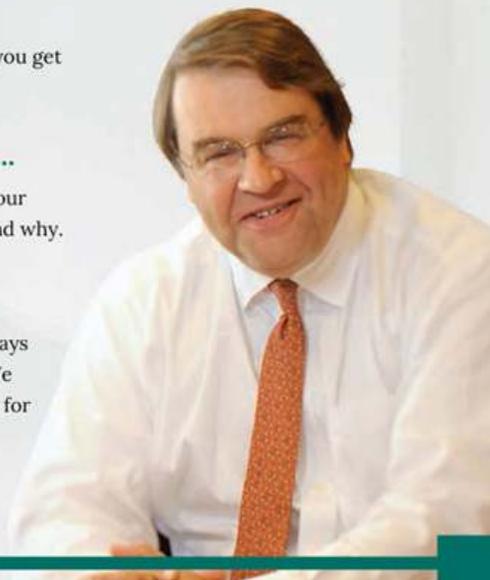
We're just right for you! We do everything as a team, which means you get the benefits of all our brains—not just one person's.

IF YOU WANT A TEAM WHO DOES THEIR RESEARCH...

You're at the right place. We do all our own research, and we keep our clients informed and educated about where their money is going and why.

IF YOU WANT A TEAM WHO TAKES A LONG VIEW...

We're right for you—and you're right for us. We plan way ahead, always keeping you and your goals in mind with every decision we make. We promise to put you first, to keep you informed, and to help you plan for the life you want.



Canva Template Links:

[Social Media Post Template](#)

[Brand Design Guidelines Template](#)

[Flyer Template](#)

V. IDEAL CLIENT AVATAR (ICA)

Ideal Customer: The ideal Dupree Financial Group client is typically 45 or older with a 500K portfolio value. This is a single (typically divorced or widowed) middle-aged woman that resides in the United States and is generally taken advantage of in the investment world. They need assistance managing their 401K or 403b plans and are interested in investing.

She has had a stock broker sell her/or try to sell her a high-commissioned annuity product that was unsuitable for her situation. She wants to feel like she is working with someone who's clear and transparent with her and keep a close eye on her investments.

They are located in Lexington, KY and potentially throughout the United States.

Social Links of Ideal Clients (KEEP CONFIDENTIAL):

[Lynn Parrish](#)

[Peg Taylor](#)