

# BRAND STYLE GUIDE



## OUR PURPOSE

(this is why we do what we do)



To expand what's possible with money

## OUR VALUES

(this is how we do what we do)



Serve Others

We put the needs of our clients, the team, and our community above our individual desires.



Bring Genius

We spend our time doing what we are best at and love most.



Listen Deeply & Speak with Care

We come to each conversation with an open mind rather than the "right answer." We tell the whole truth to ourselves, our clients and each other.



Enjoy

We believe that our time with Abacus should be the best years of (y)our life.

# OUR VISION

at abacus, we **EXPAND** what's possible **WITH MONEY.** To fully realize **WHAT'S POSSIBLE** with money,

WE CONNECT money with **VALUES.**

We serve people from **DIVERSE BACKGROUNDS** and with **DIFFERING financial MEANS.**

our culture of **HUMANITY AND CARING** creates truly impact-full **CONNECTIONS.**

By

**EMPOWERING PEOPLE** with the possibilities for their money,

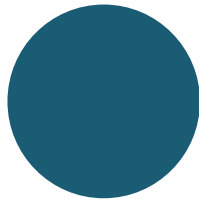
WE ENHANCE

our clients' **EXPERIENCE** **IN THE HERE & NOW** not just in the future.

WE ARE abacus wealth partners.  
we make **CONNECTIONS.**

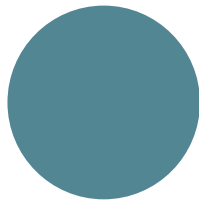
## COLORS

### Primary Color Palette



**PACIFIC**  
# 125C74

CMYK 92 56 39 17  
RGB 18 92 116  
PANTONE 7700 C



**HARBOR**  
# 538692

CMYK 71 36 36 4  
RGB 83 134 146  
PANTONE 2212 C



**GLACIER**  
# E6E7E8

CMYK 0 0 0 10  
RGB 230 231 232  
PANTONE 649 C

### Extended Color Palette



**SHADOW**  
# 414042

CMYK 0 0 0 90  
RGB 65 64 66  
PANTONE 446 C



**ARCTIC**  
# C5D6DA

CMYK 22 8 11 0  
RGB 197 214 218  
PANTONE 5455 C



**CRIMSON**  
# A9343A

CMYK 24 92 78 15  
RGB 169 52 58  
PANTONE 1807 C

# LOGOS & USAGE

## Primary Logo



LIGHT BACKGROUND



DARK BACKGROUND



BLACK AND WHITE



## Logo Icon



PACIFIC

SHADOW

GLACIER

WHITE

BLACK

## Logo Font

**BITSREAM CARMINA**

# TYPOGRAPHY

## Typefaces

We have multiple typefaces that we can use in various settings.

**Alright Sans**, our primary font is used anytime a public-facing file will be shared in a format in which can not be altered (e.g. PDF).

If the file will be accessible in an editable format (e.g. Word), we defer to our secondary font, **Avenir Next**, which is similar and much more commonly available.

**Bodini72**, an additional secondary font, is typically used for social media graphics, but can also be used in presentations or other marketing materials where an additional typeface could add visual interest.

## Type Styles

- Main headers usually have a bolded weight
- Main headers are typically upper-case in print and digital collateral (but not the website).
- Secondary headers usually have a light weight and can be either case.
- Where applicable, a smaller, third or fourth style header could be used to add visual interest, typically with a heavier weight.
- Body text is typically in sentence case and light weight, but could also be upper-case or regular weighted.
- All fonts follow similar rules.

### PRIMARY FONT

**ALRIGHT SANS (ALRIGHT V2)**  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
0123456789

### SECONDARY FONTS

**AVENIR NEXT**  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
0123456789

**BODINI72**  
ABCDEFGHIJKLMNOPQRSTUVWXYZ  
abcdefghijklmnopqrstuvwxyz  
0123456789

### EXAMPLES

**HEADER 1**

Header 2

**Header 3**

**HEADER 4**

Body text

Body text

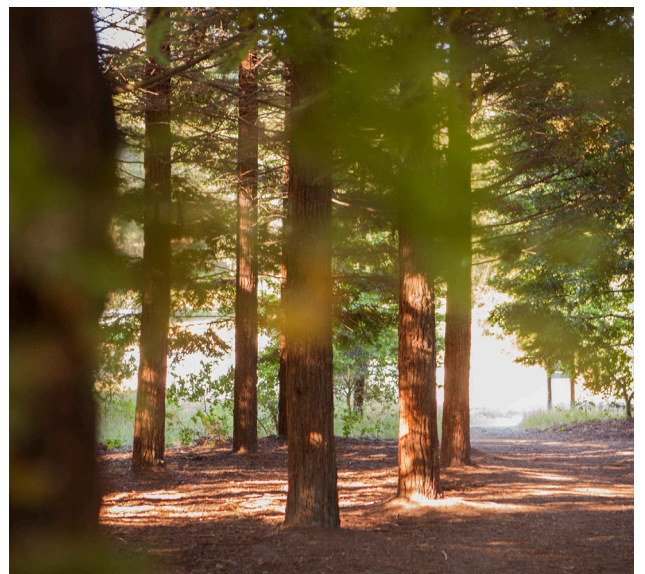
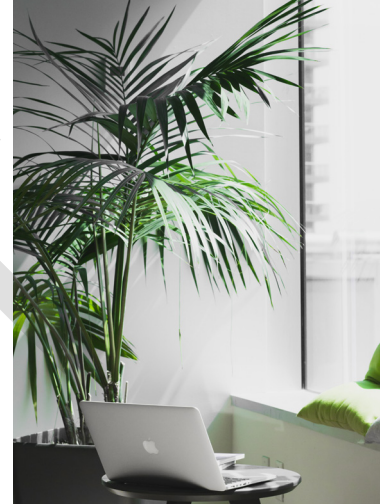
## IMAGERY

### Social Media



# IMAGERY

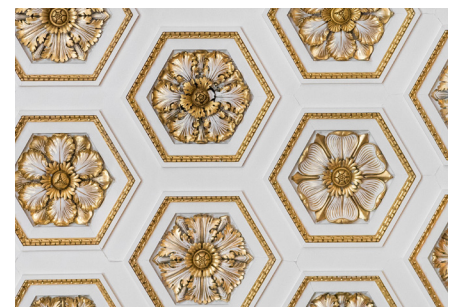
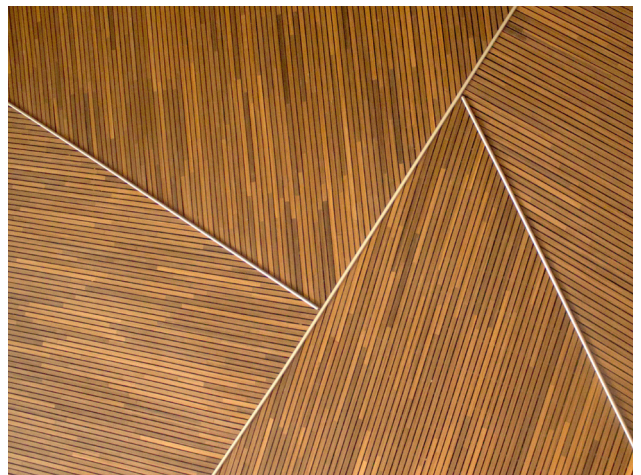
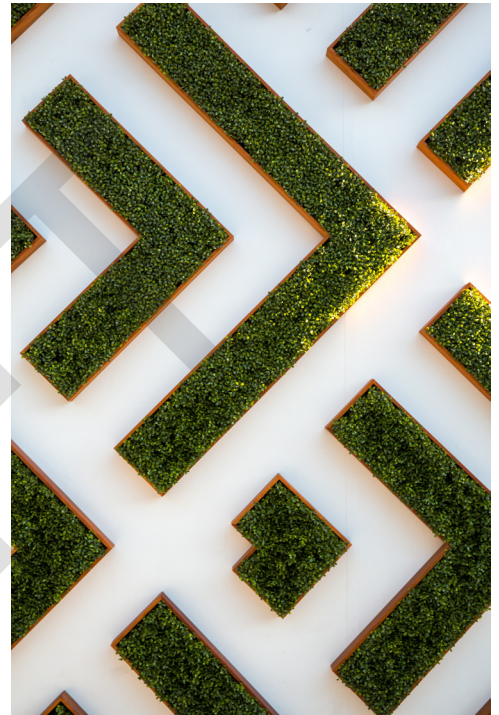
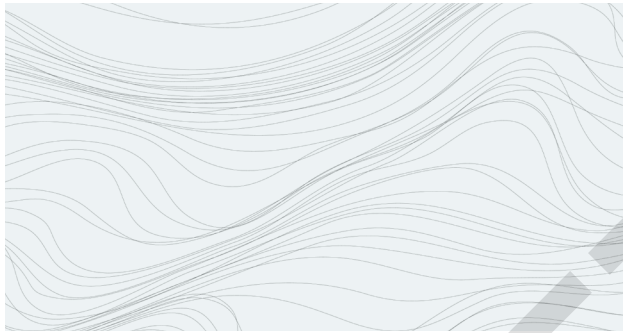
Photography





## IMAGERY

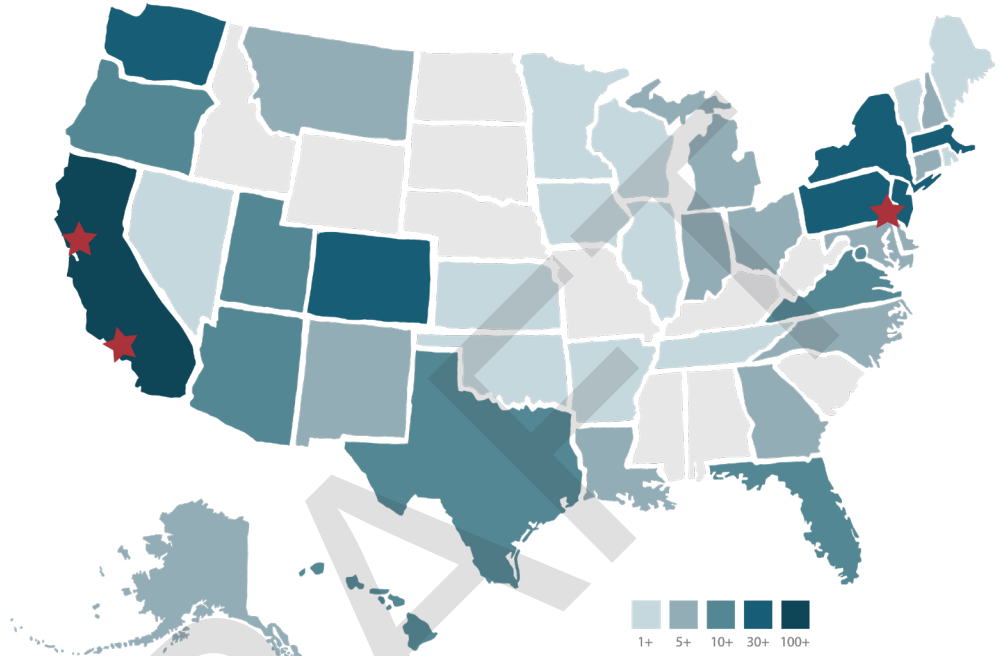
Patterns & Textures



# IMAGERY

## Graphic Illustrations

CLIENTS BY LOCATION



## OUR MESSAGING

Abacus is in the business of making financial lives better. We expand what's possible with money and assist clients in aligning their financial resources with their values.

We make money easy and fun by combining emotionally intelligent insights with rigorous financial analysis. This gives clients meaning and purpose around their money, along with concrete recommendations designed to live out their values.

We take care of all the messy details so clients can focus on what's great in their lives.

Because we are focused on values alignment and simplification of financial lives, when we create content:

### WE SPEAK WITH CARE

We communicate in a friendly, straightforward way. We are authoritative, yet approachable in our communication and utilize the power of story to connect with our audience.

### WE ARE INCLUSIVE

Abacans and our clients come from diverse backgrounds and differing financial means. We connect with our clients around their values, challenges and desires, and speak to them in a way that feels familiar and calming.

### WE ARE PLAINSPOKEN MENTORS

In a world weighed down with complex financial language, acronyms and products, we understand the confusion and shame our clients may, at times, experience around their money. Because we value simplicity and clarity, we demystify the complex and break down technical language into easy to understand financial lessons and resources.

### OUR WIT IS DRY

At Abacus, our sense of humor is straight-faced coupled with a side of eccentricity. We're quirky but not awkward, nerdy but relatable, and we give snaps instead of claps. Our humor is never snobby – and with a culture focused on inclusion, we always bring clients in on our jokes.

# OUR AUDIENCE

## Builders

### LIKES

- TRAVEL
- TECHNOLOGY
- NETFLIX/HULU
- COFFEE
- OUTDOORS/REI
- WHOLEFOODS
- EATING OUT
- SABBATICALS
- AVOIDING BURN-OUT
- DOGS
- TATTOOS
- CREDIT CARD POINTS
- SOCIAL MEDIA
- FAST NEWS
- YOUTUBE
- PODCASTS
- SUMMER READING LISTS
- BUDGETING



- Should I buy a home or rent?
- How do we save for our wedding?
- Should I change careers or jobs?
- How do I pay off my student loans and save for other goals?
- Can we afford to have kids?
- Should I save for my kid's college or retirement?
- How do I start saving for my children's college?
- Should we merge finances?
- Two household incomes or one?
- How do I make a difference?
- Am I behind on saving?
- How should I prepare for the future?

### QUESTIONS & DECISIONS

### VALUES

- FAMILY
- EXPERIENCES
- EFFICIENCY
- SECURITY
- PREDICTABILITY
- COMMUNITY
- MAKING A DIFFERENCE
- WELLNESS
- COLLABORATION
- TRANSPARENCY
- ENVIRONMENTAL CAUSES
- BEING A HERO TO MY FAMILY & COMMUNITY
- EQUALITY



# OUR AUDIENCE

## Protectors

### LIKES

- WORK/CAREER
- TRAVEL (FIRST CLASS)
- WATCHING THE NEWS
- FARMERS MARKETS
- WHOLEFOODS
- FAMILY VACATIONS
- READING
- REI
- TESLAS
- CURRENT EVENTS
- PBS, NYT, NEWSPAPERS



### VALUES

- FAMILY & GRANDKIDS
- DELEGATION
- TIME
- SIMPLICITY
- OPTIONAL WORK
- HEALTH
- RELATIONSHIPS
- ENVIRONMENTAL CAUSES
- PEACE OF MIND
- FRUGALITY
- SUFFICIENCY
- GIVING BACK
- EDUCATION (KIDS AND GRANDKIDS)
- SPIRITUALITY
- RELIGION
- STAYING A HERO

## QUESTIONS & DECISIONS

- How do I handle launching the children?
- Do I need long term care insurance? How much?
- How do I plan for my future living arrangement?
- What should I do with my business?
- How much can I afford to give to charity?
- How do I care for my aging parents?
- Do I have enough?
- Will I have enough?
- How can I make the most impact with the resources that I have?



# OUR AUDIENCE

## Changemakers



### VALUES

- INNOVATION
- HELPING OTHERS
- LEGACY
- EQUALITY
- PURPOSE
- SIMPLIFICATION
- CHARITABLE GIVING
- TRUST
- LGBT RIGHTS
- NETWORKING WITH LIKE-MINDED INDIVIDUALS
- EDUCATION
- ENVIRONMENTAL CAUSES



### LIKES

- WINE
- INFLUENCE
- EREWHON
- EXCLUSIVE ACCESS
- VOLUNTEERING
- DONATING TO CHARITY
- GLOBAL TRAVEL
- PRESTIGE
- ATTENDING EVENTS
- HIGHER EDUCATION



### QUESTIONS & DECISIONS

- How will people remember me?
- How do I raise financially responsible and not entitled children?
- What will I do with my time when I stop working?
- How do I find meaning?
- How do I measure impact (giving, investing)?
- How do I know my investments are making a positive impact?