

Capabilites Deck

CLARKSTUDIOS 

Alissa Clark

CEO & CREATIVE DIRECTOR

Justin Clark

PRESIDENT &
CREATIVE DIRECTOR

John Hallam

CHIEF OPERATIONS OFFICER
& ACCOUNT MANAGER

clarkstudios.co

949-610-2956

Welcome to Clark Studios

It is our mission to help businesses strengthen their brands, serve more customers and reach their economic objectives—through brand strategy, award-winning design and multi-channel marketing.

Let's win your brand...together.

Brand Strategy → Design → Marketing

About us

Hello!



Clark Studios was founded in 2001 by Justin and Alissa Clark, two passionate branding experts with over 20 years in the industry. After earning degrees in graphic design in the mid 1990s, the Clarks honed their skills at top creative agencies. In the early 2000's they branched out on their own, seeking a way to help businesses realign their fragmented branding and marketing efforts.

Their many years of experience led them to develop **The Studio Brand Method™** - a 3-phased approach, aligning visual identity with messaging. Their comprehensive method is designed to ensure that every aspect of your branding and marketing efforts work in harmony to achieve your business goals. With extensive expertise in spearheading robust design and messaging initiatives, Justin and Alissa assemble creative teams of the highest caliber to craft strategies for their clients' brands.

The Clarks have called Southern California home for over two decades. They are both surfers, fine artists, backpackers and have a serious love of the outdoors. Their three boys are grown and out of the nest, but they always find ways to bond as a family over exciting adventures.

Bottom line: we're ready to get to work.



trilogy
FINANCIAL
BRAND GUIDELINES
VERSION 2.0



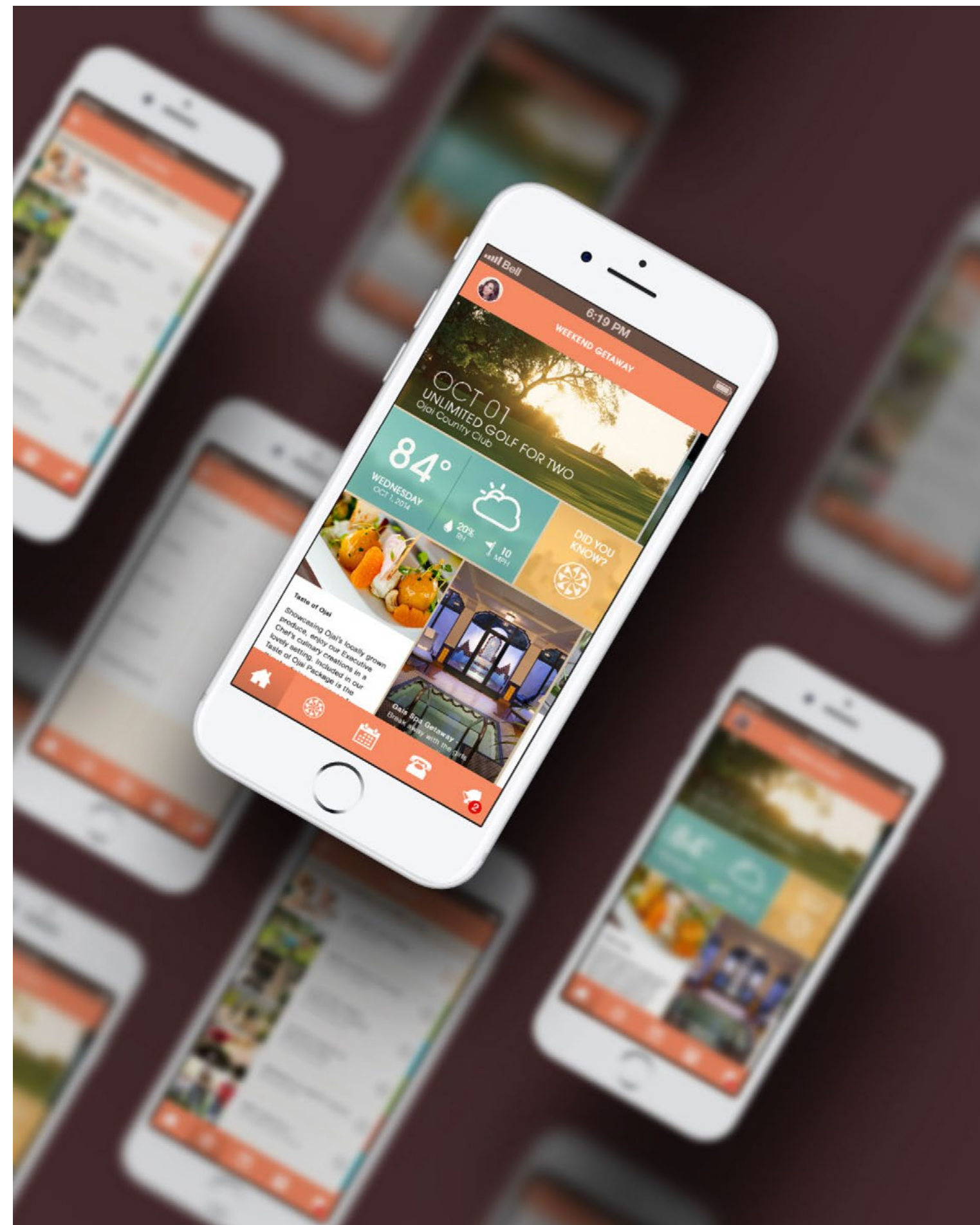
Our Work



CLARK STUDIOS is equipped with the latest production tools and technology. Our team of designers, developers, animators, and technicians are ready to handle projects at any scale.



 **IRVINE COMPANY**
OFFICE PROPERTIES



Our Services and Capabilities

We love crafting beautiful, smart and inspired work that is focused on a business' goals and their customers. We do this across multiple touch points to help organizations achieve their objectives. Our team is comprised of creatives, production coordinators and project administrators—to ensure your project runs smoothly, start to finish.

Strategy

- Brand Strategy
- Discovery & Research
- User Experience
- Positioning
- Content Strategy
- Marketing Campaigns

Branding

- Brand Development & Rebranding
- Logo & ID Systems
- Brand Style Guides
- Messaging
- Collateral, Print & Packaging
- Comprehensive Signage Systems
- Environmental Design
- Iconography

Digital Development

- Website Design & Development
- UX/UI
- Information Architecture
- Wireframing
- Prototypes
- Content Management Systems

Content Production

- Script Development
- Copywriting
- Storyboarding
- Illustration
- Animation
- Motion Graphics
- Post Production

Who We Have Worked With

A Market & Restaurant NB

AddressLive

Ambleside

Anaheim Packing House

Billabong

Bilstein Shocks

Biola University

Blue Sea Beach Hotel

Board & Brew

Brookside Market & Deli

Burnham Real Estate

Cal Valley Equipment

Carlyle Inn

Casco Contractors

Central Valley Ag Partners

Chick-Fil-A

City of Santa Ana

Coast Dermatology

Cobian Sandals

Collins Company

Conejo Dermatology

Czar Press

Developers Research

DwellingLive

Eastside Church

Epitaph Records

Ezekiel Clothing

Fairmont Schools

Gensler

Grace Fellowship Church

Harvest Crusade

Historic Hotels of America

Hodge Dermatology

HopDoddy Burger Bar

Hume Lake Christian Camps

IMG Construction Mgmt

Inspiration Cruises & Tours

Intellectual Virtues Academy

Irvine Company

JB3D

Jeffries Bros. Petroleum

Jet Suite

Joe Curren Photography

Johnny Rockets

K&N Air Filters

K West Real Estate

Levi's

Lab Holding

Laguna College of Art + Design

LBA Realty

MacGillavray Freeman Films

Make Anaheim

Maven Truth

Mariners Christian School

Mariners Companies

Mike O'Brien Swim

Missionary Athletes Intl.

Monster Energy

Montage Laguna Beach

Morans Beef

Museum of the Bible

Northrise University

Oceanpoint Ranch

Ojai Valley Inn & Spa

On a Mission Surf

Pacifica Christian High School

Pacifica Hotels

Patton Construction

Polo Sport

Preferred Hotel Group

Red Bull

Rosten Construction

SEED Peoples Market

SHAG Apparel

St. Matthew's Church

Studio 111

Saint John's Health Foundation

Sony Music

Sprinkles

Steadfast Companies

Surflife

Switchfoot

Talavera Hotel Palm Springs

The Crossing Church

The OC Mix

The Redondo Beach Hotel

Think Together

Travel Channel

Trilogy Financial Services

Toyota

TRD Toyota Racing

Universal Music

VA | Veterans Affairs

Vanguard University

Velocity Real Estate

Vintage Wood Flooring

Wahoos Fish Tacos

Waymark Development

Weathervane Clothing

West Dermatology

William Harold Jewelers

XCEL Wetsuits

Our *Water-Tight* Signature Process



QUALIFY:

We meet with you and your team to get to know you and your business.

LISTEN:

Initial Exploration Session is held, details are uncovered and pain-points discussed.

STRATEGY:

This is where we distill the data and provide custom solutions with pricing and projected timeline.

EXECUTE:

Implement strategy in phases and develop an on-going relationship.

MEASURE:

Analyze strategy results and course correct as necessary to reach your goals.

Real Results

West Dermatology

We helped West Dermatology completely reinvent their brand, increase social followings, boost appointment bookings and increased online sales, in one year.

West Derm's new look and feel is positioned as a lifestyle, fashion and beauty brand—focused on the result of quality dermatology and not the process itself.

The West Derm brand was getting lost in a sea of medical sameness... cold, process-driven stock photography and bland messaging. Clark Studios went against the grain and developed fashion-forward visuals, robust email campaigns and positive messaging, to elevate the brand amongst their clinical competitors.

Services

- Brand Strategy & Architecture
- Positioning
- Email Marketing Campaigns & Blog
- Signage
- Website Design & Development
- Brand Style Guide

Impact

- Increased clinic appointment bookings by **+30%**
- Increased customer loyalty
- Increased online product sales by **+48%**
- 2,098** appointment bookings from email campaign
- 7,370** Blog views in one month (linked to email campaign)
- Generated **4,550** appointments from Google Ads
- 92%** of potential customers prefer the refreshed brand



SKIN CANCER AWARENESS MONTH

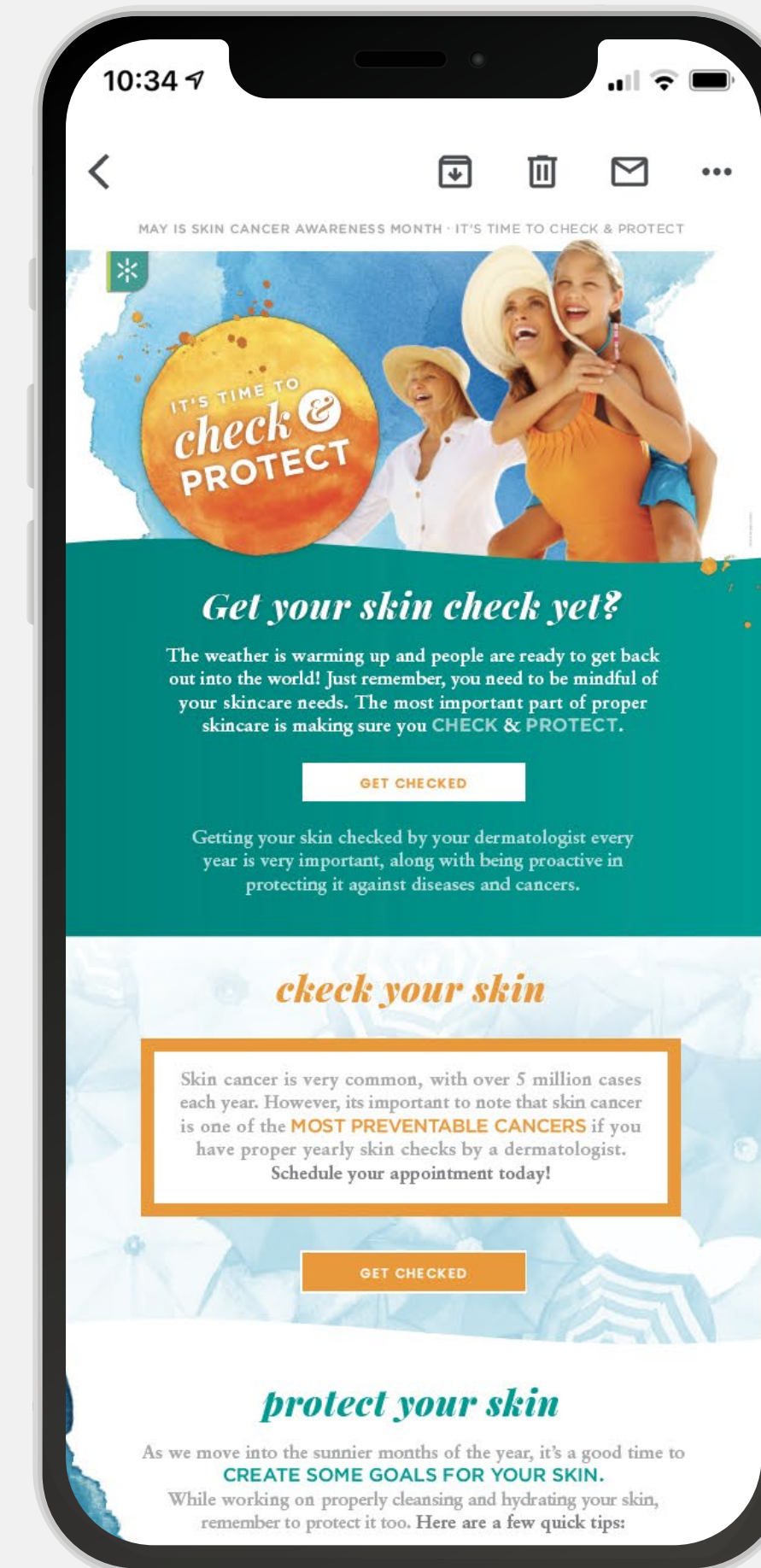
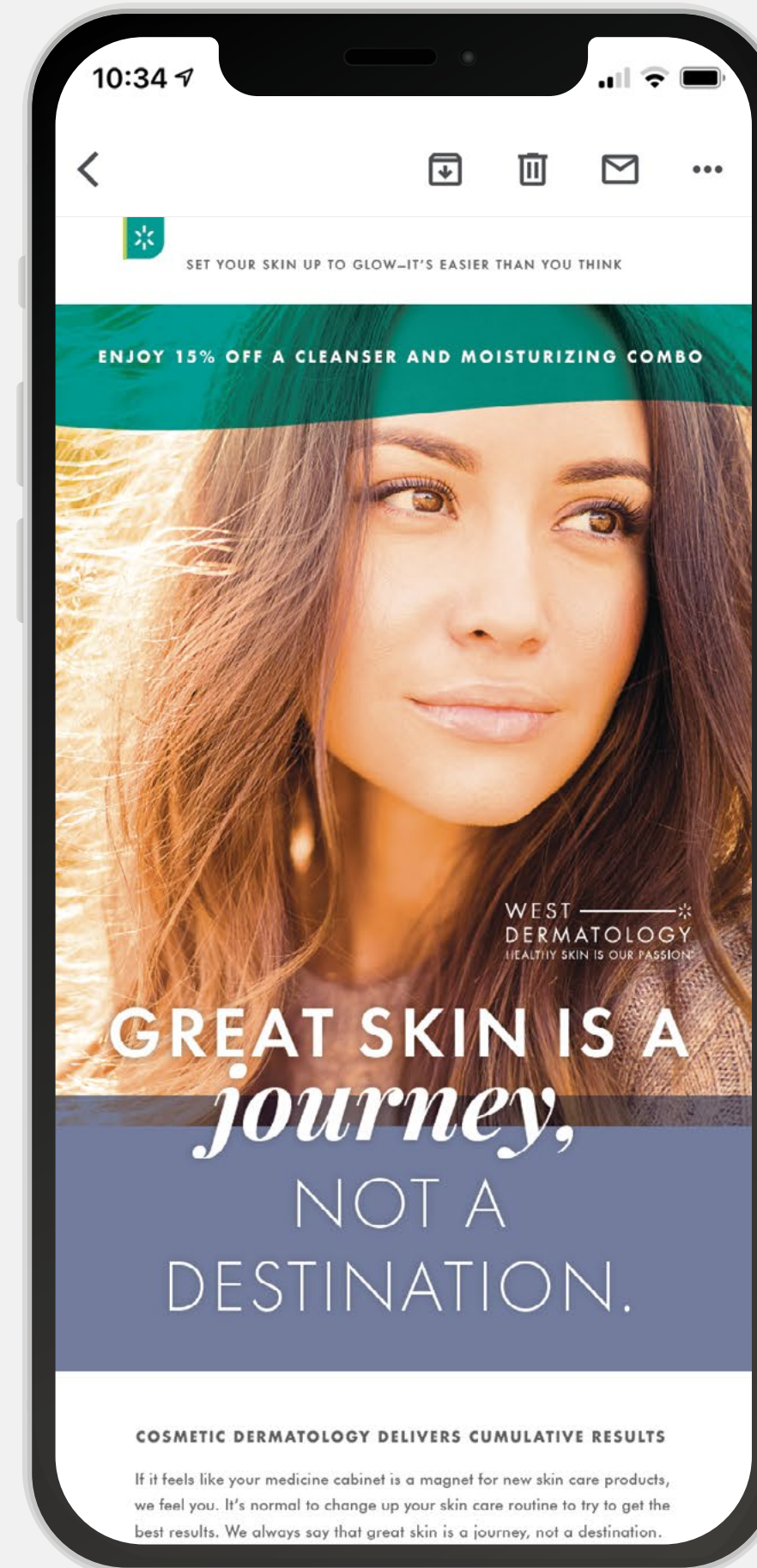
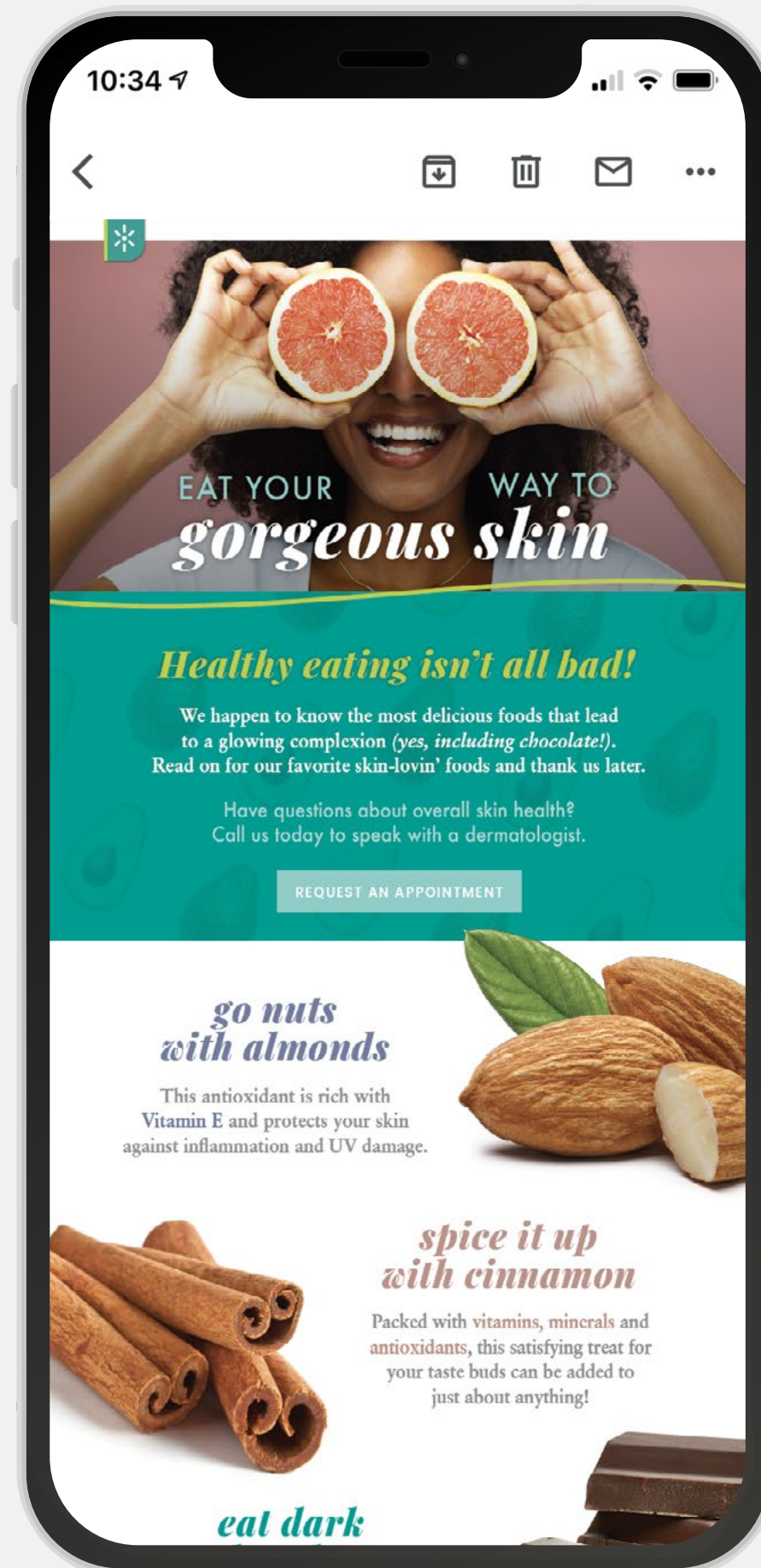
WEST
DERMATOLOGY
HEALTHY SKIN IS OUR PASSION



HOW MANY TIMES HAVE YOU BEEN

Burned?

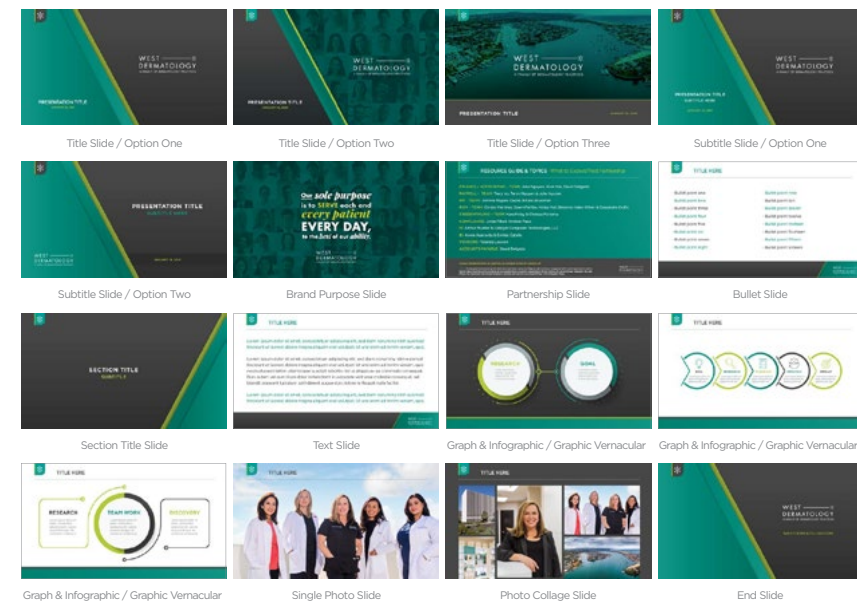
REAL RESULTS





templates

PPT WIDESCREEN (16:9)



color palette

WEST DERMATOLOGY CORPORATE COLORS



fonts

WINDOWS COMPATIBLE

All weights and variations of the Gotham type family have been selected for all branded communications. Playfair Display and Sabon fonts below are complimentary to the Gotham font family.

GOTHAM | BOOK
abcdefghijklmnopqrstuvwxyz
1234567890

playfair display | black italic
abcdefghijklmnopqrstuvwxyz
1234567890

GOTHAM | MEDIUM
abcdefghijklmnopqrstuvwxyz
1234567890

SABON | BOLD
abcdefghijklmnopqrstuvwxyz
1234567890

GOTHAM | BOLD
abcdefghijklmnopqrstuvwxyz
1234567890

SABON | BOLD ITALIC
abcdefghijklmnopqrstuvwxyz
1234567890

This Style Guide is managed by the WEST DERMATOLOGY Business Integrations & System Solutions Department. IF YOU HAVE ANY QUESTIONS OR WOULD LIKE TO REQUEST SPECIFIC ITEMS, PLEASE CONTACT ANNIE AZAROVITZ: aazarovitz@westderm.com

Official photos managed by the WEST DERMATOLOGY marketing and communications department. IF YOU HAVE ANY QUESTIONS OR WOULD LIKE TO REQUEST SPECIFIC PHOTOS, PLEASE CONTACT HEIDI KANE: hekane@westderm.com

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“Our vision was to modernize the traditional healthcare and medical dermatology look & feel. That is no easy task for anybody but Justin and team have brought that vision to life. From the imagery selection, tones and textures, every detail of our creative communications have been thought through eloquently. We could not be more grateful for the partnership we’ve built, and the attention and passion Clark Studios brings to every project. They are artists!”

–Veronica Rooney · Marketing Manager, Digital & CRM

Trilogy Financial Services

When Trilogy came to us, they were facing stagnant growth and their brand felt disconnected. Despite various attempts (and a slew of agencies on retainer) they were not hitting their targets or drawing in the right customers.

By instituting a holistic rebranding and marketing makeover that aligned their design with their message. This seamless integration was the key to attracting and retaining their ideal customers.

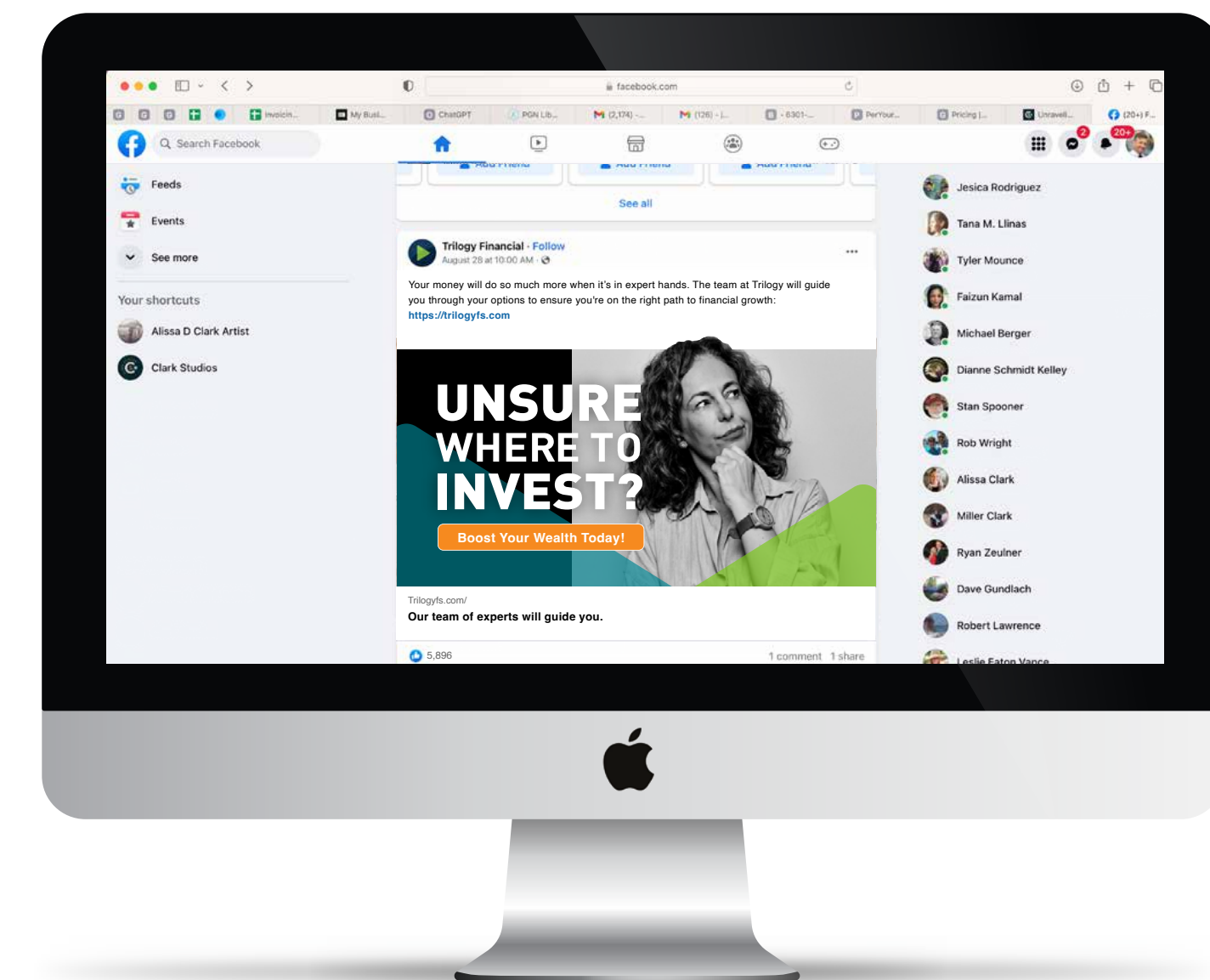
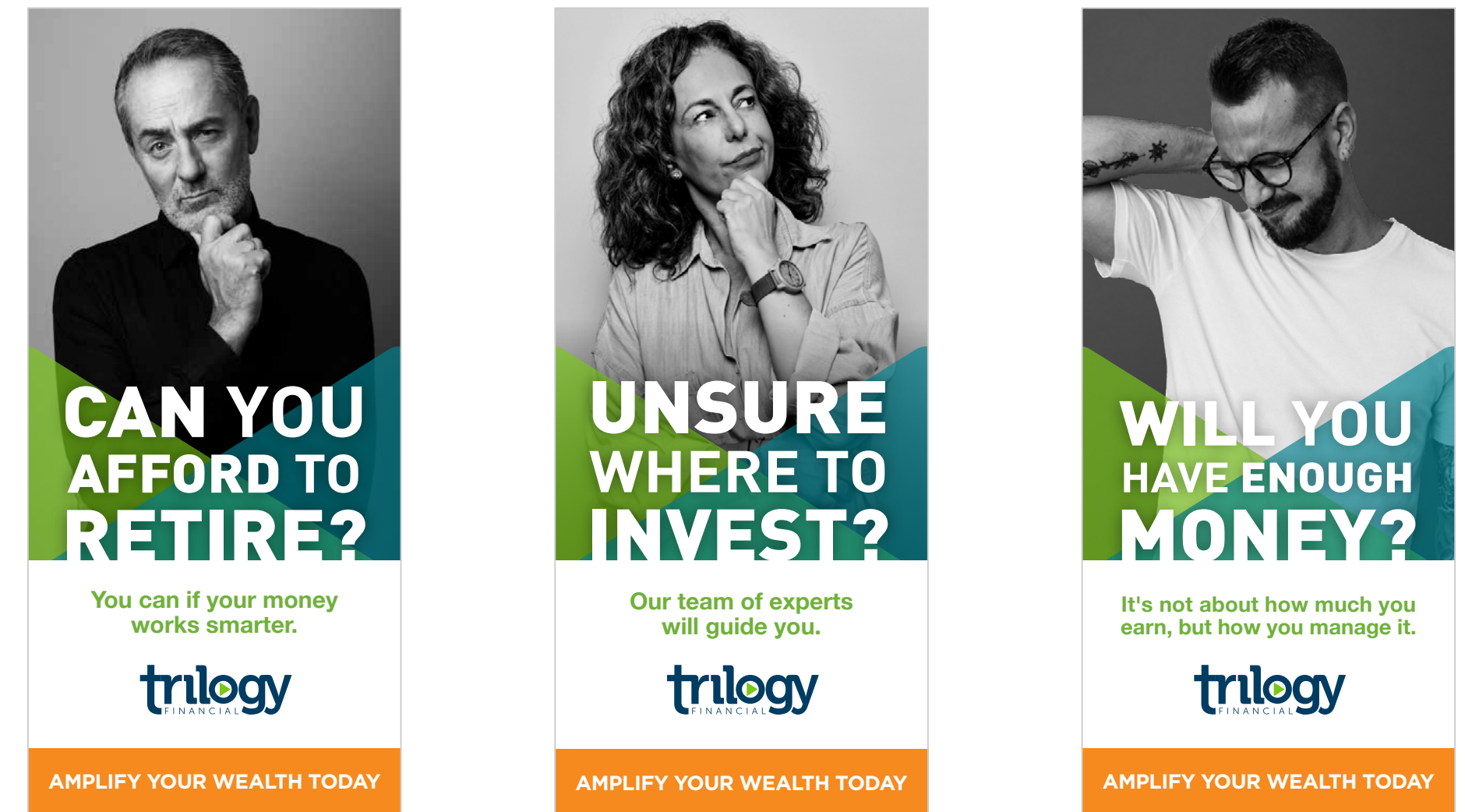
The takeaway: Good design matters, but good messaging matters equally - where design meets messaging is when brands come alive.

Services

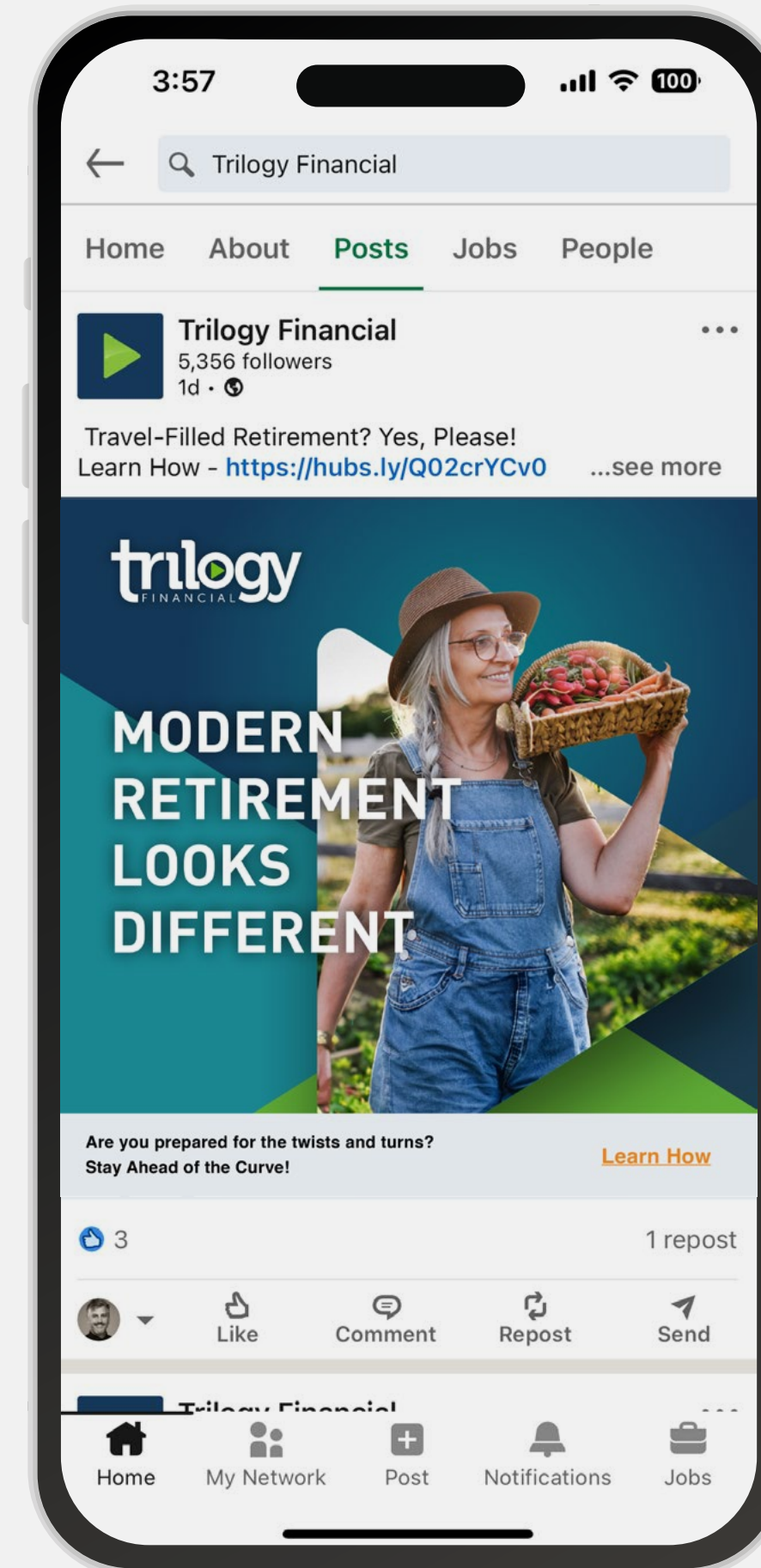
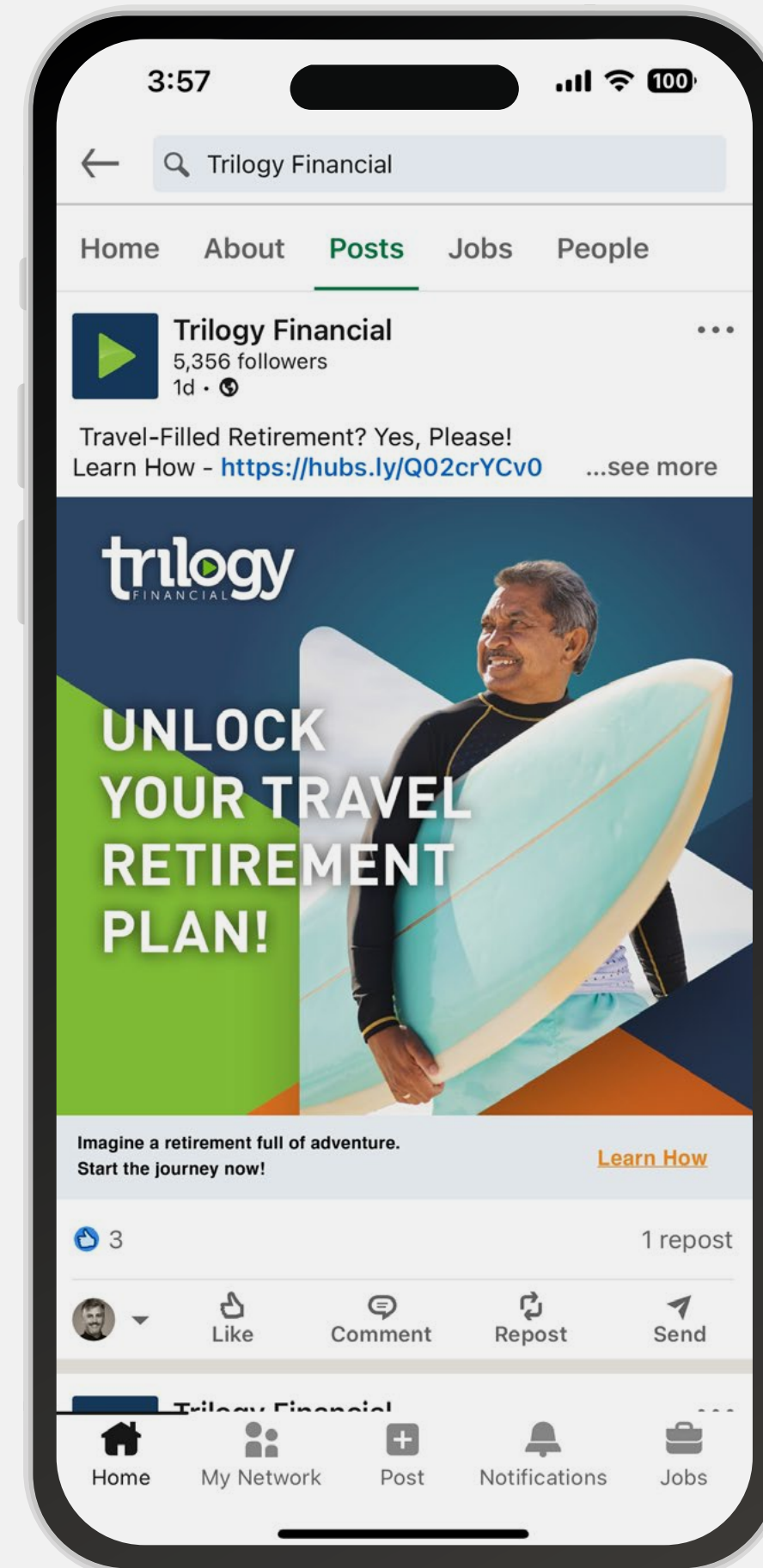
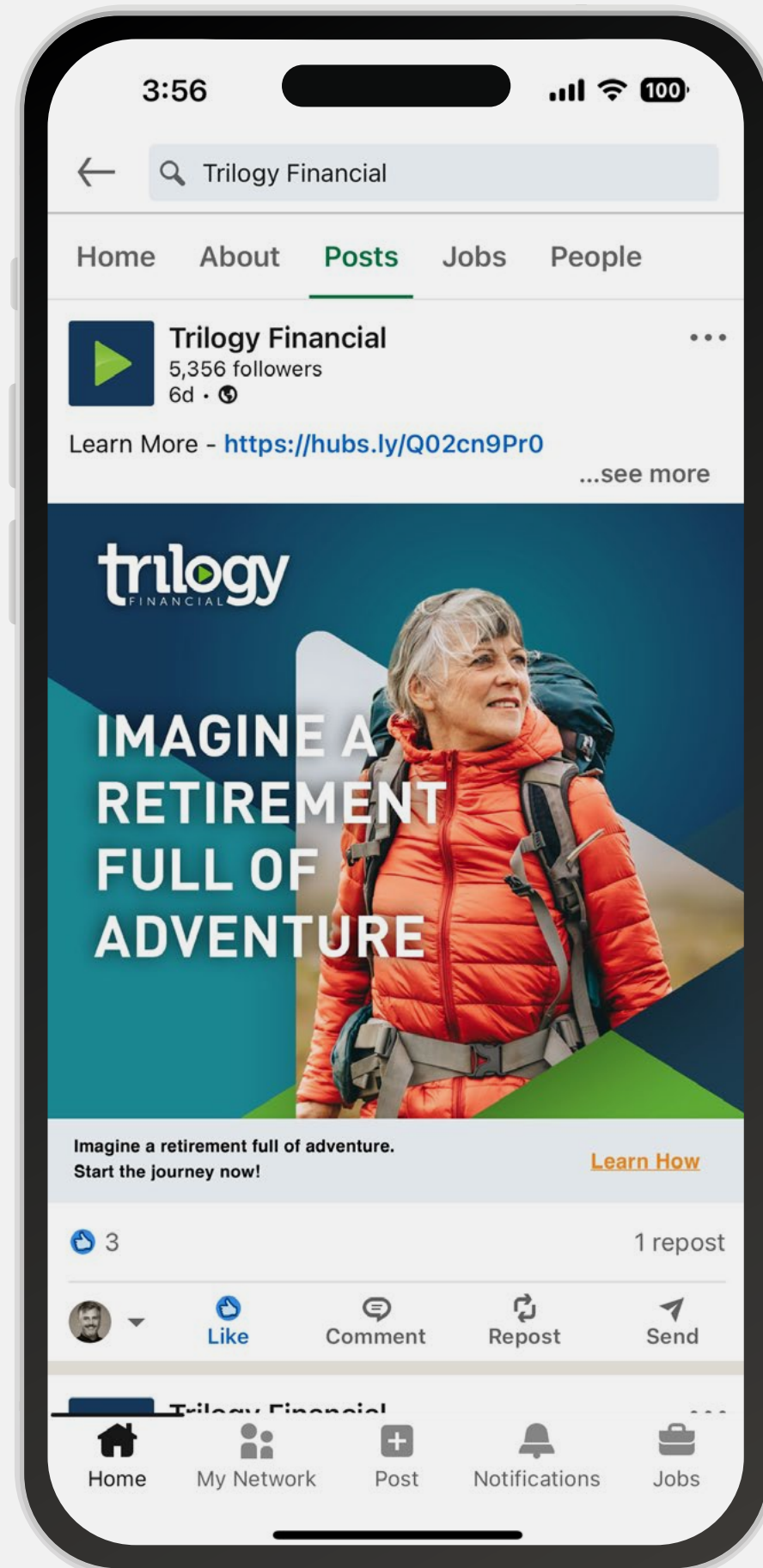
- Brand Strategy & Execution
- Positioning & Messaging
- Customer Journey Development
- Advertising Campaigns
- Media Buying
- Email Marketing Campaigns & Blog
- Landing Page Design & Development
- Brand Style Guide

Impact

- Engagement and increase in traffic to website **+48%**
- **+1,026%** more brand impressions than previous year
- CTR for Display Ad placements **+2,000%**
- Increased leads by **+1,700%**
- Cost per lead vs. previous year **-96.69%**



REAL RESULTS



trilogy FINANCIAL

Brand Strategy Roadmap

APRIL 2023

clarkstudios.co

JUSTIN CLARK
CEO + Creative Director
justin@clarkstudios.co

JOHN HALLAM
COO + Accounts Manager
john@clarkstudios.co

Key Insights

MISSION

- Implement clear and measurable economic goals in order to measure and achieve successful growth.

MESSAGE

- Trilogy's preferred outcome of the brand strategy exercise is to have a clear message and differentiation in the marketplace.
- Trilogy to transition the brand to be more approachable and focused on 'trustworthy financial planning for Middle America'.
- Position messaging around pain-points and use language that customers and clients understand.
- Trilogy embraces its core values, which include humility, perseverance, authenticity, and being client-centered. New messaging should reflect this.

Mission Statement

Page 4 FOUNDATION

"Helping motivated Americans build financial independence."

Actionable Mission (Internal)

- We will acquire 3 'aging-out' financial advisor businesses by the end of 2023, and 3 more over the next 5 years. (Roughly \$6.7M in new revenue per year over the next 5 years)
- We will gain an additional 3,500 households by the end of 2023, and 17,500 over the next 5 years, through our customer referral program. (Roughly \$4.9M in new revenue per year over the next 5 years)
- We will gain an additional 1,000 households by the end of 2023, and 5,000 over the next 5 years, through networking via professional relationships. (Roughly \$1.4M in new revenue per year over the next 5 years)

...because we thrive on guiding as many households as possible toward financial independence.

We serve middle America with trustworthiness; serving people who need help with their finances, whether they don't have enough for retirement or want to make their money as efficient as possible.

Who Are We Talking/Selling To?

Age Range: 25-44 (Generation X and Millennial)

Gender: Male & Female

Geography (Main): California, Colorado, Arizona, Massachusetts

Income Range: (Annual): \$100,000—\$250,000 (Light-Blue-Collar)

Attitudes and Aspirations: Early adopt retirement planning

What are the problems they are facing? Buying a home, mortgage

What % of revenue is this group? 20-30%

What media outlets are they on? LinkedIn, Instagram, Facebook, YouTube, Podcasts, Magazines (print+digital), Gaming, News

Goals

TODAY	GOAL	TIMEFRAME
\$35M Annual Revenue	\$100M Annual Revenue (3x)	5 Years (2028)
M&A: 3 practices already purchased	M&A: Purchase 10-15 practices (\$25M-\$200M in AUM/each)	5 Years (2028)
25,000 Client Households	3,500 Additional Households 17,500 Additional Households (client referral program)	1 Year (End of 2023) 5 Years (End of 2028)
25,000 Client Households	1,000 Additional Households 5,000 Additional Households (networking professional relationships)	1 Year (End of 2023) 5 Years (End of 2028)



Personality Traits

Page 9 BRAND PERSONALITY

TONE OF VOICE	VALUES
Humble, determined, client-focused/centered	Joyful accountability, life-planners, family-oriented culture
Trusting, caring, giving, professional, serious, innovative	Perseverance, teamwork, client-centered, humility
Speak clearly, solution-based, never wary	A fiduciary authority and guide to our clients
Sense of urgency, speak to client pain-points	Empowering our team + clients to reach financial freedom

Personality Highlights

Page 10 BRAND PERSONALITY

CARE

- We are family-oriented, developing trust and care within our communities.
- We care for the younger generations (ages 25-45) and desire to help them plan ahead for retirement.
- We offer clear solutions and use words that middle-Americans understand.
- We work with those who have little or a lot of money (no minimums).

MESSAGING

- We speak with authority, as a guide, we are experts, yet humble and approachable.
- We have clear messages that speak to our clients' pain-points.
- Simple and direct messaging, such as "let me help you find your number to retire," can be more impactful than talking about planning in a vague and ethereal way.

Brand Gap

Page 19 GAP ANALYSIS

TRIOLOGY'S PERCEPTION	TARGET AUDIENCE'S PERCEPTION	DESIRED STATE
We help and serve everyone	People feel they need to have a certain amount of money for Trilogy to work with them.	People know Trilogy 'helps those who need help', period.
We are transparent with our service fees	Unsure if Trilogy clearly addresses their service fees	Clients feel taken care of and not blind-sided by service fees
We employ advisors in their mid-forties with an average tenure of 17 years	People may have no idea Trilogy intentionally employs younger, experienced advisors	We communicate how we are different from financial institutions who are on the verge of advisors 'aging-out'
Our clients love us because they work with us year after year	Survey existing customers and gather more data	The target audience and Trilogy both perceive the brand accurately

SWOT analysis (Trilogy)

Page 20 GAP ANALYSIS

INTERNAL		EXTERNAL	
STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> Trustworthy, good planners, high service Family-oriented, credible experts Advisors in their mid-forties Advisors with a 10+ year tenure A mid-size business that can pivot quickly Alignment of core values 	<ul style="list-style-type: none"> Data management Marketing in general Unclear messaging Doesn't have a legacy name like Edward Jones Not attracting a younger demographic Brand misalignment 	<ul style="list-style-type: none"> Reaching out to existing 10,000 households Refreshed brand look and feel across all marketing channels Redistribute marketing budget to align with new economic objectives Robo-planner tool for self-paced financial education Referral Program (for both clients and Trilogy advisors) 	<ul style="list-style-type: none"> Government regulations Changing regulatory environment Market crashes Changing customer attitudes toward Trilogy Inflation

SWOT analysis (Competitors)

INTERNAL	
STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> Marketing and advertising Large marketing budgets with a larger reach A legacy name 100+ years in business Strong personalities 	<ul style="list-style-type: none"> Advisors 'aging-out' Too big for personalization National, not regional Lack of personality Unable to pivot quickly Access to funds Company/customer relationships



Target Audience Highlights

Page 16 TARGET AUDIENCE

- Population Size:** As of 2021, the estimated population size of people aged 25-54 in the United States is approximately 115 million.
- Education:** Approx. 36% of people in this age range have a bachelor's degree or higher.
- Employment:** In 2020, the labor force participation rate for this age group was 82.5%. Many people in this age range are in the prime of their careers.
- Income:** The median household income for people aged 25-44 in 2019 was \$68,703, while for those aged 45-54 it was \$84,100.
- Technology:** People in this age range are increasingly using technology, with 97% of people aged 25-34 owning a smartphone and 86% using social media.
- Lifestyle:** Many people in this age range are focused on establishing their careers, starting families, and achieving financial stability.

115 MILLION
82% EMPLOYED

AGE: 25-54

TECH SAVVY
HHI \$76K

Opportunity Highlights

Page 22 GAP ANALYSIS

- Households to upsell additional offerings.
- new video graphics (titles, lower-thirds, title/end-cards, animations).
- mission
- items, adjust colors, add new

Brand Roadmap Execution Plan

Page 23 BRAND ROADMAP

- Refresh brand look and feel (visuals: imagery, fonts, glyphs, photos, advertising layouts).
- Develop and design a family of icons/logos to differentiate service/product offerings.
- Refresh messaging/communication with a focus on (3) target audiences.
- New messaging: Client pain-points w/ a sense of urgency, and solutions.

Brand Roadmap Target Audience Age: 25-44

Page 24 BRAND ROADMAP

- Multi-Channel Campaign #1** *The Early Retirement Blueprint: How to Build a Financially Secure Future and Enjoy Life on Your Own Terms*
 - Email: Series of (6) designed emails (targeted nurture drip campaign with sales conversion strategy)
 - Secure Future and Enjoy Life on Your Own Terms
 - Direct mail: (quarterly) newsletter, booklet/brochure or oversized postcard
 - Videos: (outlets: LinkedIn, FB, Trilogy landing page, Twitch, YouTube) + Client testimonial videos
 - Social: (LinkedIn, IG, FB, Twitter, BeReal) w/ content calendar and monthly management (check w/ LPL on Instagram allowance)
 - Surveys: (designated email plus landing page and value offer/free download for participating)
 - Blog Posts: (Trilogy website)
 - Referral Program
- Multi-Channel Campaign #2** *How to Avoid the Student Debt Trap*
 - Referral Program
- Multi-Channel Campaign #3** *Fiduciary Comedy: Poking fun at the financial industry*
 - Referral Program

Brand Roadmap Target Audience: M&A

Page 25 BRAND ROADMAP

- M&A Collateral Design Package**
 - Design a custom collateral package for M&A prospects (tangible/printed/packaged) including stats and infographics
- M&A Landing Page**
- M&A Presentation Deck (Custom template design)**
- Event Sponsorship (Golf, food & wine, NB Christmas boat parade)**
 - Banners, advertising, event program, lanyards, golf balls, bespoke promotional products
- Multi-Channel Campaign Retire Your Business with Confidence**
 - Email: Series of (6) designed emails (targeted nurture drip campaign with sales conversion strategy)
 - Direct mail: (quarterly) newsletter, booklet/brochure
 - Videos: (outlets: LinkedIn, Trilogy landing page) + Buyer testimonial videos
 - Social: (LinkedIn) w/ content calendar and monthly management
 - Blog Posts: (Trilogy website) M&A insights + retiring your business/leaving a legacy
 - Paid Digital Advertising: (Google (banner, display and retargeting), LinkedIn)
 - Paid Print Advertising: (Trade magazines, travel magazines, foodie magazines, WSJ Business)

Key Insights

Page 26 BRAND ROADMAP

- Trilogy's target audience is up to \$250K who have a light-to their hard-earned money, T revenue, despite only making
- Trilogy's M&A target audience managing \$25M-\$250M A
- Trilogy to engage young that engages them in a f
- Re-engage with original planning services or oth
- Trilogy to conduct cus different in the market

“

“We strive each day to be as creative as we can and to execute new ideas. 36 years in business, it is still archeology finding creative professionals that we can collaborate with. **Clark Studios has been one of those special agencies that gets it**—their work and delivery is very special.”



Shaheen Sadeghi

CEO / PRESIDENT • LAB HOLDING

“

“Clark Studios has partnered with Ojai Valley Inn through over **\$80 Million** in master plan renovations. From signage, branding, renaming of buildings, packaging and logos to media strategy and media purchasing. **Our sales & marketing teams rely heavily on Clark Studios**, we appreciate their talent, creativity, and commitment to excellence.

I would recommend Clark Studios to anyone in the luxury segment with a discerning customer base.”



Alex Kim

RESORT MANAGING DIRECTOR • OJAI VALLEY INN & SPA

“

“Working with Clark Studios has been great for our company’s image and especially our website. Our brand was ‘dated’ and our old website turned off potential clients. **Our new logo and website are first class and are already generating new leads.**”



Casey O'Callaghan

PRESIDENT • O'CALLAGHAN GOLF COURSE DESIGN

“

“I’ve had the privilege of collaborating closely with Clark Studios, and they **consistently deliver transformative branding, design, and marketing solutions**. They have a high level of commitment to excellence, helping us build and implement comprehensive marketing campaigns that propel us towards our strategic goals. Clark Studios doesn’t just provide services; they serve as a **strategic partner**, ultimately helping us better serve our clients and fulfill our purpose.”



Rae Harker

MARKETING SPECIALIST • TRILOGY FINANCIAL SERVICES

“

“Clark Studios has been a crucial partner in our school’s ongoing cultivation of our mission and programs through its creative branding and stunning designs. **Clark Studios has consistently gone above and beyond for over a decade** to help us achieve our dreams and thrive as an institution.”



David O’Neil

HEAD OF SCHOOL • PACIFICA CHRISTIAN HIGH SCHOOL

“

“Clark Studios did a fantastic job bringing our web presence current and relevant in today’s market. Very attentive to the demands of the project, getting the job completed. Our photo shoot was a huge success, with **amazing results**. Look forward to working with them in the future.”



Matt Jeffries

CEO • JEFFRIES BROTHERS PETROLEUM

Our Team



Justin Clark

PRESIDENT &
CREATIVE DIRECTOR



Alissa Clark

CEO &
CREATIVE DIRECTOR



John Hallam

CHIEF OPERATIONS OFFICER &
ACCOUNTS MANAGER



Kristina Bates

ART DIRECTOR &
MOTION GRAPHICS



Geoff Harkins

ART DIRECTOR



Fabian Wizenfeld

DIGITAL DIRECTOR &
WEB DEVELOPER



Marci Santoni

OFFICE MANAGER &
BOOKKEEPER

Our Partners

The best solutions are born from collaboration. Our expanded team is comprised of a network of trusted entities that tackle projects collectively.

Our integrated partners work seamlessly with us to provide our clients with expanded service options.

DOTZOE

DOTZOE

DIGITAL DEVELOPMENT

Dotzoe is our digital production partner based in California, which specializes in Web Development, Social Media and Online Advertisement.



THE DOT CORP.

PRINTING & FULFILLMENT

The Dot is a diverse printing business, specializing in offset and digital printing, fulfillment, direct mail solutions and tracking.



JB3D, INC.

SIGNAGE & ENGINEERING

JB3D is an Orange County based, multi-disciplinary sign fabrication, engineering and sign installation business.



MAVIS MEDIA

VIDEO PRODUCTION

Mavis Media is a broadcast design and production studio specializing in live action, motion design, animation, and production for film, television and web.

Let's Amplify Your Brand!

CLARKSTUDIOS Co

For inquiries: team@clarkstudios.co | clarkstudios.co