

BRANDING & MARKETING TO WIN

WITH WESTSTAR

HOW WESTSTAR'S
FLYING V GIVES WINGS TO
ADVISORS' DREAMS



PROSPERITY

MIGRATORY GEESE COVER IMMENSE DISTANCES
TOGETHER IN THEIR **FLYING V'S**.

Flying as a team is super aerodynamic and energy-efficient. It's also the safest way to fly.

At lift-off, the geese are sure they'll reach their goal and touch down safe and sound. They can relax along the way, confident in the guidance, experience, and lift they'll need to get there.

Prosperity begins where uncertainty ends and it means the world to us: prosperity for you, your practice, and your clients is in our name and DNA.



WASHINGTON STATE | OREGON | CALIFORNIA | NEVADA | SOUTH DAKOTA | ALASKA | IDAHO

FOREWORD | ON BECOMING FUTURE-FIT

FROM SAM GULLETTE

I joined WestStar for two reasons: first, I wanted to be an advisor and not a salesperson; and second, I needed to surround myself with good people who wanted to give good advice.

I believe our purpose in advising is more important than the financial payoff, and in many ways, negative customer perceptions of our industry have arisen because the main focus has so often been about selling financial products to people.

Our clients want independent financial planning and guidance delivered as a service over the course of a decades-long relationship - they need for us to be a sounding board and to help them identify forks in the road. They want options- a decision-making framework- and professional insight from us.

Freedom from corporate agendas and product biases are among the many advantages that independence offers, but independence can sometimes prove lonely and be a barrier to advisor growth and prosperity.

INDEPENDENT AND NOT ALONE

At WestStar we've built a high-functioning network of like-minded advisors who empower one another to make a difference. Collaborating with some of the best firms and individuals across the Western United States is great for mutual growth and the client experience: and by delivering financial planning as a holistic service, we're restoring the reputation of our industry.

Collaboration is a key strategic lever, and with it, the chance to maximize what we can accomplish as a network, and discover how big a difference we can make for the advisors and clients we serve.

WestStar's vision has attracted great support from Cetera Wealth Partners, and they are committed to seeing our advisors and their firms thrive.

"Our team is proud to work with the WestStar Prosperity Group and appreciate their leadership as an independent advisor group on the West Coast. WestStar's networked ecosystem promotes idea sharing, teamwork, and best practices – all focused on helping each advisor grow their business."

Tom Halloran - President of Cetera Wealth Partners.

Growth remains the key goal for all of us,
and it is here where I believe our greatest challenge lies.

GROWING IN THE DIGITAL WORLD

In yesterday's world, it was largely possible to build our businesses and reputations in person, but today's customers want the convenience of engaging on their terms, whenever they want, on whatever device they choose.

At a foundational level, the pandemic has accelerated changes in the way we do business and how clients find us, and those firms and advisors who have effectively positioned their brands online are having real success.

Statistics show that irrespective of how prospects find us (whether by search, referral, or word-of-mouth), 82% will use the internet to learn more about us before they initiate contact.

Because we can't bank on representing ourselves in person anymore, branding, digital marketing, SEO, and advertising are "must-haves" in the battle for customers' attention and loyalty.

Most competitors face the problems of an unfamiliar digital playing field, unfamiliar rules, and the reality that the winners will be those who master both.

In January 2020 we began examining how accelerating demand for online engagement would reshape the way we do business. With 980,000 Finance and Insurance Businesses (Bureau of Labor Statistics), and 218,000 Financial Advisors (IBISWorld) shaping up to compete for customers online, we asked ourselves: "What will it take for WestStar Group and our many DBAs to get ahead of the digital curve?"

In reaching the answer, we came to focus our attention on 3 key priorities.

- **Stand out in the digital storm.** To win the battle for the customers' attention, we'd need stand-out branding and marketing capabilities.
- **Build deep customer connections at a distance.** To advance customer engagement, we'd need digital engagement platforms and prowess.
- **Create vibrant ecosystems and partnerships.** In bringing these branding and marketing solutions to our network, we'd need to engage with specialists.

Over the past 18 months, we've worked with IDC, a branding and digital transformation consultancy, and with Algorithm, a leading digital marketing performance agency, to rebrand WestStar and establish the foundations for a digital marketing platform to meet the growth needs of both the WestStar Prosperity Partners and WestStar Group DBAs.



BUILDING THE PLATFORM FOR FUTURE GROWTH

We can all be positioned to have businesses that are ahead of the industry's customer engagement curve. To get there means helping you achieve 3 key marketing goals:

Attract - Grow your customer base (generate and convert qualified leads).

Engage - Connect meaningfully online, across business and social channels.

Delight - Generate referrals by leveraging positive client and COI relationships.

We have our eyes fixed on the long game, and we're on an expedition to build prowess and impact in the digital realm. Being able to lean on WestStar for lead-generating marketing campaigns and quality branding, design, copywriting, and search engine optimization (SEO), will prove extremely valuable to all our network advisors and DBAs.

I'd like to share some key insights we've gained, and unpack the capabilities we've assembled to support our network advisors: you'll get a picture of the WestStar brands, the network, and the marketing and branding platforms as they operate to give you and your business a real lift on your journey ahead.



CO-OWNER & CEO, WESTSTAR PROSPERITY GROUP



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A SHORT HISTORY OF WESTSTAR

From a product sales & distribution company...

Our industry and our business used to be about product sales and distribution. WestStar held contracts with ING and Voya back then, and we did the distribution for life and annuity products. Agents selling these products through WestStar would do their securities through us as well, and we provided compliance audits for our broker-dealer.

...to an Advisor Enablement Group...

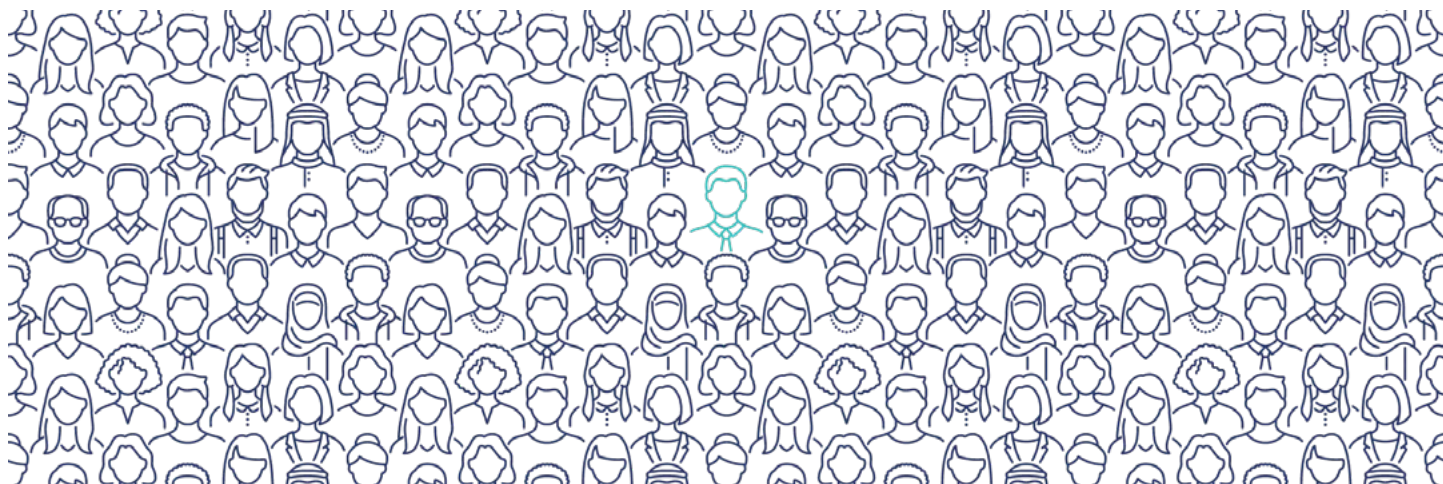
Over the past few years, as our advisors' and their clients' needs have evolved - and industry regulations have changed - WestStar has transitioned from a product and distribution company into an advisor enablement group and a powerful advisory network.

Today we provide an A-to-Z practice management toolkit and close professional support to equip our advisors to be better business owners. Our compliance role has shifted from doing the audits to being a compliance shepherd, pre-auditing advisors, and equipping them with practices and systems to be safe and prepared for audits. We've built on providing compliance preparedness by adding best practice sharing at our events, and hosting webinars and calls that bring advisors together to share challenges and ideas.

...Flying together in the digital world.

The future is about getting our advisors known in the digital realm, and preparing and positioning them to perform at their best.

We are invested in leveraging WestStar as a network brand, developing a branding and digital marketing platform to support our independent advisors and DBAs in their marketing efforts, and in growing our network.



CREATING UNIQUENESS IN YOUR MARKET

The always-on, hyper-connected digital world is not a familiar or easy environment for most financial advisors. Yet the fact that 82% of prospects and referrals will assess you online before initiating contact makes being seen in your best possible light essential to attracting new business.

It's worth asking yourself these questions:

- When CPAs and attorneys look at your website, do you stand out among your peers, or are you filed away in their mental Rolodex as “just like everyone else?”
- Do you tell the right story to client referrals researching you?
- Is it clear on your website who you work with, what makes you unique, what problems you solve, and how you address your clients' needs?

When it comes to creating uniqueness, the stakes couldn't be higher; that's why we're on our mission to help WestStar network's advisors stand out in the crowd, attract their prospects' attention, and make the right impression once they've got it.



Having put the time and effort into developing and fine-tuning your website, your success will likely depend on how it is perceived by a prospect in about the time it takes to stir their coffee.

You never get a second chance to make a first impression, and your branding will play a powerful role at these critical moments.

A prospect's assessment will also have to do with what you say about yourself, whether you make your value proposition clear and if it matches what they're looking for. Your competitors will be striving to make their brands and propositions uppermost in browsers' minds, and out of this clutter, you'll want to emerge as the brand of choice, and withstand competitive ploys to lure your customers away.



MAKING CUSTOMER CHOICE EASIER

How do you build a unique and powerful brand that distinguishes you, appeals to your markets, and conveys who you are?

In a world where you're being judged from a distance, your success will hinge on being found in the clutter, and in the way you are perceived. Branding allows you to differentiate yourself and your promises in a visible way.

Branding is the suit you wear and the flag you fly to stand out from the crowd in a compelling way.

Your brand must emerge from what motivates you, and what you do (uniquely) to solve your clients' problems or meet their needs. One sure way to attract clients is to own and build perceptions around a unique advantage. That way, your brand will be seen as valuable, and trustworthy.



BUILDING BRAND AUTHORITY

The key to your brand's value lies in its power to influence customer decisions and build loyalty.

Your "uniqueness" can be expressed in many ways.

- Your business or brand name.
- Your brand logo, colors, fonts, and tagline.
- Your customer value proposition and your story.
- Your brand personality, tone-of-voice, and visual imagery.
- Your values and the way you see the world.

Awareness for your brand will increase over time, as your reputation and credibility build loyalty and word-of-mouth advocacy.

Brand equity is the sum of all these distinguishing qualities that generate personal commitment to - and demand for - your services.

REBRANDING WESTSTAR

We decided to rebrand our WestStar Financial Group and Bellevue Financial Partners businesses in 2020.

Our rebranding project allowed us to consider our brands and marketing challenges in light of WestStar Group's mission -

“To enable independent financial advisors to grow profitable businesses, attract quality clients, become better business owners, and thrive in their careers.”



**EMERGING-STAGE
ADVISORS**



**GROWTH-STAGE
ADVISORS**



**MATURE-STAGE
ADVISORS**

Having workshopped these goals with independent advisors and DBAs, we concluded that the only way to achieve our mission in tomorrow's world would be to solve the branding and marketing challenges that we - and most advisors and firms in our network - face.

Driving growth means helping you attract new customers online, generate qualified paid-for and organic leads, engage meaningfully across business and social channels, and leverage positive client and COI relationships.

We established that the only way to make this possible was to build one network gateway brand as a lead magnet for all advisors and firms, and provide access to comprehensive digital marketing and branding solutions through Partnership and Association.



BRAND PARTNERSHIP & ASSOCIATION

Advisors and firms affiliated with WestStar Group choose to operate under the WestStar Prosperity Partners gateway brand, or under their own DBA brands, as WestStar Prosperity Associates.

WESTSTAR PROSPERITY PARTNERS

WestStar Prosperity Partners are a group of individuals and small teams working together under the WestStar Prosperity Partners brand. Our branding and marketing teams provide the marketing platform, campaigns, and prowess to gain attention and attract leads in the marketplace. With WestStar's marketing support and media spend, you get to stand out, build your reputation, and attract customers to your profile on our WestStar Prosperity Partners and Group websites.

WESTSTAR PROSPERITY ASSOCIATES

WestStar Prosperity Associates are DBAs working under their own brands, with marketing support from WestStar. WestStar's marketing campaigns and media spend will draw customer attention and leads to your firm's and advisors' profiles on our website's Advisor Showcase. These are linked to your own company website. Furthermore, our digital performance and brand marketing teams provide you dedicated on-the-ground support, plus SEO optimized white-labeled content.



**WestStar Prosperity Partners and DBAs are proudly supported by
WestStar Prosperity Group.**



Becoming a brand of choice - what's in the WestStar name?

The WestStar name ticks many positive boxes.

- WestStar suggests high-performance and sounds like an established brand.
- WestStar gives us a point on a compass and a direction to follow.
- WestStar provides a guiding light, and a star to hitch your wagon to.

WestStar offers immediate associations with guidance, direction, navigation, and performance.



In building the client-facing WestStar Prosperity Partners brand, and advisor-facing WestStar Prosperity Group brand under the WestStar banner, we gain strength and visibility across markets and channels.

- The WestStar brand provides a link with our past and positive associations in the future.
- WestStar creates a brand halo for independent advisors operating under the WestStar Prosperity Partners' brand.
- We provide DBAs operating under their own brands, the WestStar brand as an endorsement- a sense of belonging, support, continuity, and infrastructure.
- All advisors and firms collaborate in the WestStar Network.
- An ad for any part of the network becomes an ad for all parts!





WESTSTAR'S PROSPERITY PROMISE

Customers form trusting relationships with brands that attract them, relate to their needs, and represent causes they agree with.

The 2021 Capital One Survey says 77% of Americans admit to fear and concern about money. Stress over money plagues poor and wealthy alike – executives earning 6 figures are among the most stressed.

- 73% of Americans rank finances as the most significant source of stress in their lives.
- 7 out of 10 are “most worried” about their financial future, which includes not having enough money to retire (68%), keeping up with the cost of living (56%), and managing debt levels (45%).

No matter your life stage, how much you're earning, or how well prepared you are, you won't enjoy living today if you can't stop worrying about tomorrow.

Everybody wants
to live without fear,
anxiety, or worry.

How do we solve the problem?

PROSPERITY

To live prosperously is to live your best life – full of confidence in tomorrow.

WestStar provides advisors and their clients the support and confidence that comes with knowing where they're heading, understanding how to get there, and following the WestStar Way.

Prosperity gives us a valuable story and an answer to the unfulfilled desires of most Americans.

- **Customers want Prosperity.** Wealth, retirement, and financial security are important goals, but prosperity speaks of all-round wellness and confidence in your financial future.
- **Financial advisors and firms want Prosperity.** Prosperity means offloading baggage that's weighing you down, and being empowered to pursue your personal and professional growth with confidence, clarity, and more time to do the things that matter most.

Prosperity provides a perfect halo under which our Partners can operate, and the ideal endorsement to support our various DBAs' promises.



"Working with WestStar is where I want to be. We don't simply set out to build our clients' wealth and financial security, we build a real understanding of what tomorrow looks like. That means confidence and clarity for all our clients, and that's real prosperity!"

Mark Serafini - Financial Consultant, WestStar Prosperity Partners



We all know that stories are effective in marketing, and we've made sure that our star icon tells WestStar's story.

Looking for prosperity
and progress? **Go west!**

Simple and graphic, our focused star icon is made up of the unique 'A' character in the WestStar logotype which is rotated around a central axis. This creates a graphic star with the 'A' on the right (East on a compass) being accentuated as it is heading towards the West.

The star icon provides a dynamic sense of movement, accuracy, navigation, and direction. It carries echoes of the flying Vs we see on the West Coast.

HITTING THE SWEET SPOT



COLORS OF COMMITMENT

Colors that combine well

We wanted a color that we could 'own' and so picked Aurora Teal, and it is paired with Midnight Navy for a sense of sky/sea, masculine/feminine, and of traditional/modern.

Navy says **solid**. Teal says **innovative**.

LOGO FORMATS

We developed the formats and shapes that our logos will take on, and found that the visual interplay between the flying V and the WestStar 'A' remains strong.





BUILDING THE PLATFORM FOR FUTURE GROWTH

In our introduction we spoke of business practices that put us ahead of the industry's customer engagement curve.

Also, of the need to help all our advisors attract, engage, and delight prospects via a powerful marketing platform, and marketing services partners who provide digital prowess and impact across business and social channels.



GENERATE LEADS & COMPETE ONLINE

While branding allows us to visibly differentiate our businesses, and strong value propositions and compelling stories are foundational to establishing values, none of this matters unless we're positioned to attract prospects online.

When it comes to growth, every financial advisor needs a delivery system of qualified leads.

Unfortunately, there's no magic formula: to grow we must attract qualified leads for our network advisors' profiles and websites, and this requires both a systematic process over time, and a significant advertising spend.

In the digital marketing game, leads are generated via organic marketing and paid-for advertising.

- **Organic Marketing** is the deliberate, ongoing process that attracts traffic to our businesses over the longer term (taking effect after 12 -18 months), using quality search engine optimized content (blog posts, case studies, emailers, podcasts, social media etc.) to build SEO authority.
- With **Paid Advertising** (pay per click, google ads, retargeting, etc.) we are guaranteed to reach defined audiences, and can employ our content to generate qualified leads from the start.

The most competitive strategies target a combination of organic and paid-for leads, but they present a real challenge to every advisor and DBA. That's because they are time-consuming, and require expertise, guidance, deep data, and a significant budget commitment.



We have to be seen before we can sell.

With 980,000 Finance and Insurance businesses, and 220,000 Personal Financial Advisors targeting customers online, the question everyone's asking themselves is...



How does a **snowflake** stand out in a blizzard?

If we want to attract new customers online, simply having an online presence (a website, LinkedIn Profile or Facebook Page) isn't enough. We must attract our prospects' attention before we can gain their interest.

It follows that our growth will depend on understanding the digital marketing game, mastering the playing field and outperforming our opposition.

NEW GAME | NEW PLAYING FIELD | NEW RULES

NEW GAME

To grow, we must attract customers that fit our ideal customer profiles. When they search online for a financial service or an answer to a financial question, we must be positioned to be easily found.

NEW PLAYING FIELD

Attracting customers takes place mainly on Google, which has a market share of almost 90% in desktop search. Studies prove that 94% of Google click-throughs are from Page 1, so making ourselves visible on Page 1 (or at least Page 2) is a must in order to generate organic leads. This requires an effective SEO strategy and content unique to WestStar Partners and Associates.

Here's why it is vitally important.

NEW RULES

The best way to think about Google is as a giant questions and answers machine. Prospective customers search online for products, services, or answers to financial questions - and if the question they type into Google leads them to find us on page 1 or 2 of their search results, we'll gain their attention.

In the battle for customers, content is king; it is important when anyone visits our websites. There's plenty of it out there, but this means nothing without prospective customers to view it.

No advantage at all can accrue to us by targeting customers with the same SEO, keywords, and content that thousands of other advisors are using.

The templated solutions available to us may offer great content to all participating players, but the only way to create an SEO advantage is through our own unique content.

To accomplish growth, we must attract the right customers to our businesses, and to do this we must both understand how Google ranking works, and develop our own (genuinely helpful and unique) content and optimized websites to establish SEO authority in our markets. This alone will get us seen.

HOW GOOGLE RANKING WORKS

Google dictates our website's ranking against our competitors, and decides who features on Page 1 and beyond. Ranking depends on a host of factors like volume of traffic to our website; page speed; mobile-friendliness; optimization for local search; site content; domain age; technical SEO (whether our website is set up to be easily seen by search spiders or robots); user experience; bounce rates; our links, and loads of other factors. It takes no small amount of time and dedication to get to Page 1.



GETTING FOUND ONLINE

To get found on page 1 or page 2 means getting these ranking essentials right and knowing what questions are being asked across the financial landscape's conversations. This allows us to pinpoint the best (least congested) gaps or entry points in the market's searches to occupy. These gaps dictate how we use SEO and keywords on our website, and how we develop our own bespoke content.

NEW GAME PLAN

The optimal way to solve these complex, time-consuming and data-intensive marketing challenges we all face is to create a single WestStar Prosperity Partners (& Associates) network brand, with its own SEO optimized content and campaigns that generate leads for all advisors and firms, and promote traffic to their websites and advisor profiles.

To become the “go-to” Financial Advisor network in the Western United States, WestStar is building the gateway brand with marketing prowess that benefits you.

Instead of you pioneering the vast space alone, our network brand will support and endorse you. Our goals include strengthening your (and our) overall digital marketing prowess. And crucially, boosting everybody's performance via the development and implementation of paid and organic digital marketing campaigns that generate leads and promote traffic to your company's and advisors' profiles on the WestStar Prosperity Partners (& Associates) website.

HOW CENTRALIZED MARKETING WORKS?

WestStar's Centralized Marketing Program is a cornerstone of our strategy to help network advisors and firms grow. Pooling moderate monthly marketing contributions from all advisors gives us, collectively, over 50 times greater marketing power than we could have alone.

We can't manage what we can't measure: the centralized fund is used to make performance monitoring, measuring and managing possible, and to do things that no single advisor or firm could ordinarily undertake or afford: like produce campaigns and branding materials of real quality, and run digital campaigns that generate leads.

OUR CENTRALIZED MARKETING PROGRAM DRIVES TRAFFIC TO YOUR PROFILES AND YOUR FIRM'S WEBSITE.

WestStar's marketing efforts are designed to attract prospective customers to a number of landing pages codeveloped with you on our WestStar Partners website. The WestStar Partners website becomes both a destination site and the gateway to channel prospects to your personal and company profiles that feature in the Partners and Associates Advisor Showcase on the WestStar Partners website (unpacked below). This is done via marketing funnels, content, lead magnets, and forms. We provide assistance with helping you create templated company and personal profiles in our Advisor Showcase, while polishing them so they sparkle, and creating links and backlinks to your own website and personal profiles to boost SEO.



➤ **Click here to download**
“Top 10 Benefits of WestStar’s
Centralized Marketing Program.”

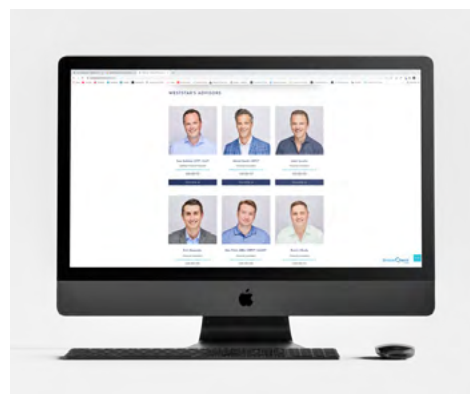
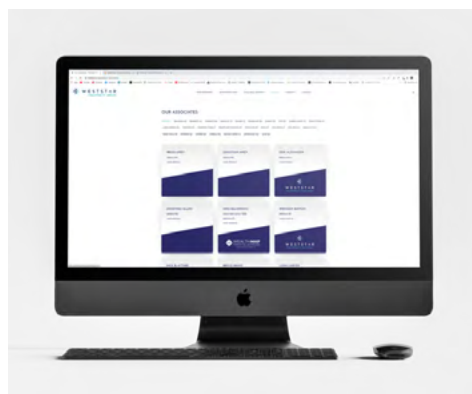


WESTSTAR PROSPERITY GROUP SHOWCASE

OPEN TWO NEW WINDOWS TO YOUR WORLD

DBA ASSOCIATES - as WestStar Prosperity Associates, you'll have your SEO-optimized business profile and the personal profiles of your advisors showcased on the WestStar Prosperity Partners' website. You'll have click-through links to your company website and advisor profiles, and backlinks to boost SEO. Prospects can find you when searching for advisors near them, advisors offering particular services, or simply an advisor or firm offering them the advice and values they're seeking.

PARTNERS - as a WestStar Prosperity Partner you'll get a personal profile to be proud of on WestStar Prosperity Partners' website, showcasing who you are, what you stand for, and what you do best.



Our Centralized Marketing Program synchronizes business and social marketing.

The potential ROI of social marketing means all advisors and firms should be actively building their social profiles. WestStar helps you establish your professional profiles, and with consistent (moderate) effort, and step-by-step guidance, you'll build your social presence like a veteran.

Our network provides the ecosystem for content generation and sharing. In LinkedIn terms this is called a POD. In our network POD, advisors engage with WestStar's and each other's posts to build visibility and impact, and attract more interested and engaged prospects.

DEDICATED, QUALITY RESOURCES

Data-driven marketing is the future, and we enjoy specific and deep data. Our digital performance partner, Algorithm, is a leading data-driven digital performance agency specializing in search engine marketing, paid media, and digital consulting.



Algorithm's proven approach is based on international best practices: by following their blueprint-driven processes, we can target ideal customers through enhanced search engine marketing, and online customer engagement.

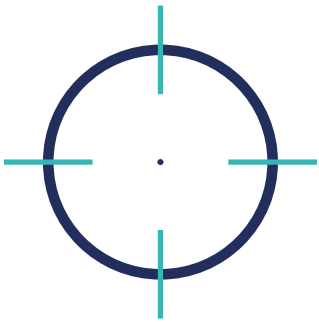
PROCESS, PLATFORM, PROWESS

Algorithm's digital marketing performance 'machine' goes to the granular level for data, giving us a detailed understanding of how our prospective customers search, find, and purchase financial services online.

Their powerful set of proprietary tools makes progress monitoring and measuring simple: we get to know what the opposition is up to, and how to drive our SEO and digital marketing performance.

The machine lifts us all to the next level via:

- Search engine optimization.
- Web analytics and data insights.
- Engaging customized media (across all channels).
- Conversion rate optimization.
- Paid-For advertising campaigns.



ALGORITHM'S MARKET SHARE ANALYSIS

– find out where tomorrow's opportunities lie.

Algorithm's content visibility and opportunity analysis is a powerful tool in driving performance marketing and SEO strategy. It's usually Step 1 in generating insights that drive multiple KPIs.

- **Evaluate our target markets.** We can prioritize our website's content by identifying what our target markets are searching for and the number of searches per month.
 - > What search terms and keywords are they using?
 - > What content is gaining visibility?
 - > What platforms are driving visibility?
- **Opportunity Analysis.** See where there are gaps between our visibility and target markets. This does away with the shotgun-based approach to digital content and gives us a laser-focused set of priorities.
- **Competitor Analysis.** Algorithm's visibility report overlays competitors' data and allows us to see where they're performing and which gaps are there to occupy.



ACCURATE ACTIONABLE INSIGHTS

Imagine knowing simple things like how many people looked at your website, what questions they asked Google that lead them to find you, and what parts of your website attracted their attention.

- **Algorithm's approach makes digital performance measurable, providing actionable, accurate insights through automation and clear data visualization.**
- **We'll get a clear picture of where we should be focusing our efforts to gain more qualified traffic.**



CONTENT GUIDANCE TO DRIVE ENGAGEMENT

- **Content is the fuel that drives online performance, and their insights and tools guide content inventory, chase lists, writing briefs, and copywriting.**
- **Their audits will show where our content strategy should be focused, based on our advisors' niches, geography, services and relative competition.**
- **Algorithm's click-through rate analysis is a detailed view of various performance metrics that impact SEO performance and performance marketing.**



YOUR OWN LEAD-GENERATING MACHINE

Algorithm's lead-generating machine is designed to provide your and our ideal customers relevant and fresh content, and the stories that reflect their needs.

Larger DBAs can supplement WestStar's efforts by developing their own Organic digital marketing campaigns.

You'll enjoy a closely guided journey as you develop your strategic and tactical acumen, with fully supported processes to develop content and manage and measure your digital performance.

- **Tap into Algorithm's capabilities and fully guided performance marketing processes.**
- **Make your digital performance measurable with actionable insights and clear data visualization.**
- **Enjoy content development help from our marketing team.**
- **Get your website optimized to ensure you're found when searched by referrals and prospects.**
- **Optimize your online performance, and stay ahead of the knowledge curve.**



WESTSTAR'S MARKETING PERFORMANCE PLATFORM

DIGITAL MARKETING PERFORMANCE HUB

Partners and Associates benefit from SEO-optimized marketing and communications that drive engagement, and generate and distribute leads.

Algorithm's marketing machine and fully guided processes make digital performance measurable, with actionable insights and clear data visualization. Get your website optimized to ensure you're found when searched for. Elevate online and social performance, and stay ahead of the knowledge curve.

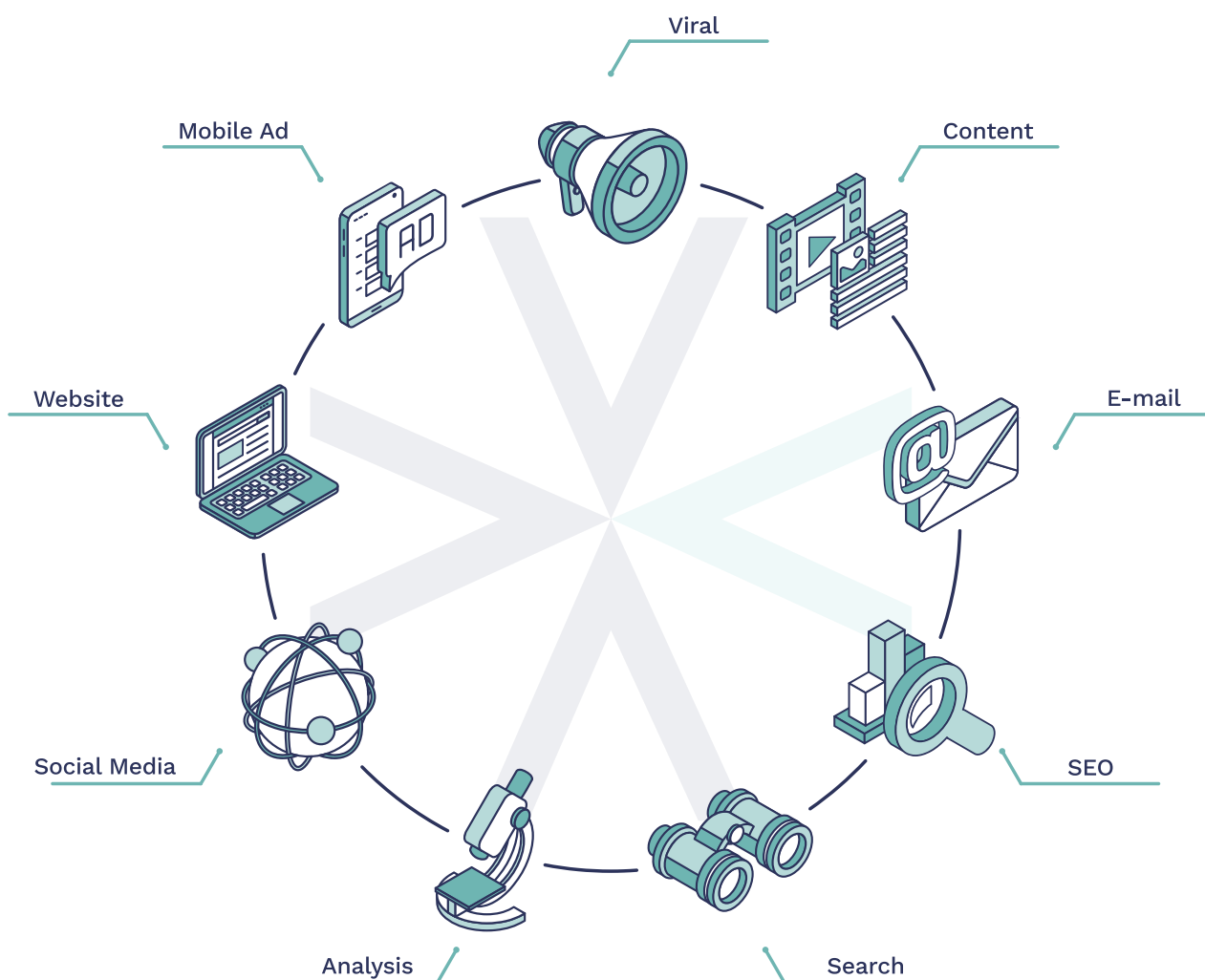
BRANDING & MARKETING SERVICES

Partners and Associates can tap into our affordable branding and marketing services including strategic marketing, copywriting, and design services and advice for your brand, practice, social media, and website needs. WestStar's knowledgeable and experienced branding and marketing team creates and executes integrated digital marketing plans that are customized to your markets and measurable in results.



CONTENT & KNOWLEDGE HUB

- Branded and white-labeled marketing material (eBooks, Blogs, Articles, Campaigns, Presentations and more).
- Digital Marketing "How to" Videos and process Blueprints.
- WestStar Practice Management educational Worksheets and Instruction Documents.
- Expansive Library of Tools and Resources.



WESTSTAR PROSPERITY GROUP'S **MARKETING BENEFITS SUMMARIES**

WESTSTAR PROSPERITY **PARTNERS'** BENEFITS

As a WestStar Prosperity Partner you'll relish the camaraderie and lift that comes with belonging to WestStar's Prosperity Partners' team and the WestStar Group Network.

Our customer-focused WestStar Prosperity Partners' brand image will be grown through various marketing imperatives:

- Our website and user experience.
- Our SEO and proprietary content marketing.
- Communications targeting client retention and acquisition.
- Our in-sync Social Media Marketing.
- Our customer and community events.

These activities are fundamental to gaining customer awareness, engagement, and growth.



With WestStar Prosperity Partners, you'll get to:

- Stand out in the blizzard and get noticed.
- Provide a winning online customer engagement experience.
- Enjoy full branding (stationery, office signage, and other identity elements).
- Access SEO-optimized content to drive customer engagement.
- Build awareness in your community and market niches.
- Have organic and paid-for leads generated for you.

WESTSTAR PROSPERITY **ASSOCIATES'** BENEFITS

DBAs retain their independence and brands and enjoy the profile and lift that come with being part of to WestStar's Advisor Network and brand-building efforts.



BOOST YOUR **DIGITAL MARKETING PERFORMANCE**

- WestStar generates and directs leads to you.
- We work with you to develop communications that target client acquisition and retention.
- You'll access white-labelled bespoke SEO-optimized content.
- You'll be part of our in-sync Social Media Marketing POD.
- Larger firms may also embark on their own supported organic marketing drive.

DBAs get to work with WestStar's branding and marketing services team and enjoy extremely low-cost input for your own website makeovers, social media profile development and refreshes, and assistance with any branding, design, copywriting, content development, infographics, and photo imagery requirements.



WESTSTAR PROSPERITY GROUP IS PROUD TO SUPPORT OUR PARTNERS AND ASSOCIATES.

Our badge testifies to our strong support, continuity, and infrastructure. The badge amplifies the halo effect for our WestStar Prosperity Partners, and endorsement for WestStar DBA's activities, along with WestStar and Cetera's community standing and elevated customer trust.



WESTSTAR PROSPERITY GROUP NETWORK

WestStar's network empowers advisors and firms to make a difference and collaborate together to achieve mutual growth.

Our family of advisors and firms all benefit from the network effect:

- WestStar Prosperity Group's guidance, focus, and personal attention.
- The strength and experience of professionals in our advisory network.
- WestStar and Cetera's strong community standing and elevated customer trust.
- Economies of scale through streamlined product and services offerings.
- Reduced customer acquisition costs through shared marketing impacts.
- Direct line to our Broker-Dealer to get things done efficiently and resolve any issues.
- The profile, influence and visibility of a large Western US network.

"Being a part of WestStar Group has many benefits. One that we find invaluable is being able to speak with other offices within the WestStar Group to learn best practices that can help our office become more efficient and provide a better experience for our clients. Having those resources available is very important to our firm and a benefit we value greatly."

Brian Kampbell FLS Financial Group



YOUR PLATFORM FOR FUTURE GROWTH

At WestStar we believe we can all be positioned to have effective businesses that are ahead of the industry's customer engagement curve.

It has to do with the way we're perceived, our stories, and the crafting of our client journey. It's also about how best to inform, educate, and nurture prospects to a point where we can ultimately convert prospects to become quality clients.

The better equipped and professional we can be, the better we will perform in our markets.

We've had our eyes fixed on the long game as we've established the marketing platform and partnerships on which to build into the future. The Platform's stand-out advantages will mean better business for everybody, better ways to build deep and lasting customer relationships, and to grow together in tomorrow's world.

I hope I've painted a clear picture of what our future holds. Don't hesitate to call me or send me an email, and let's chat about the various benefits of partnership and association.



SAM GULLETTE

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WESTSTAR
PROSPERITY GROUP

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