



Legacy Concierge™

**STYLEGUIDE
11.17.22**

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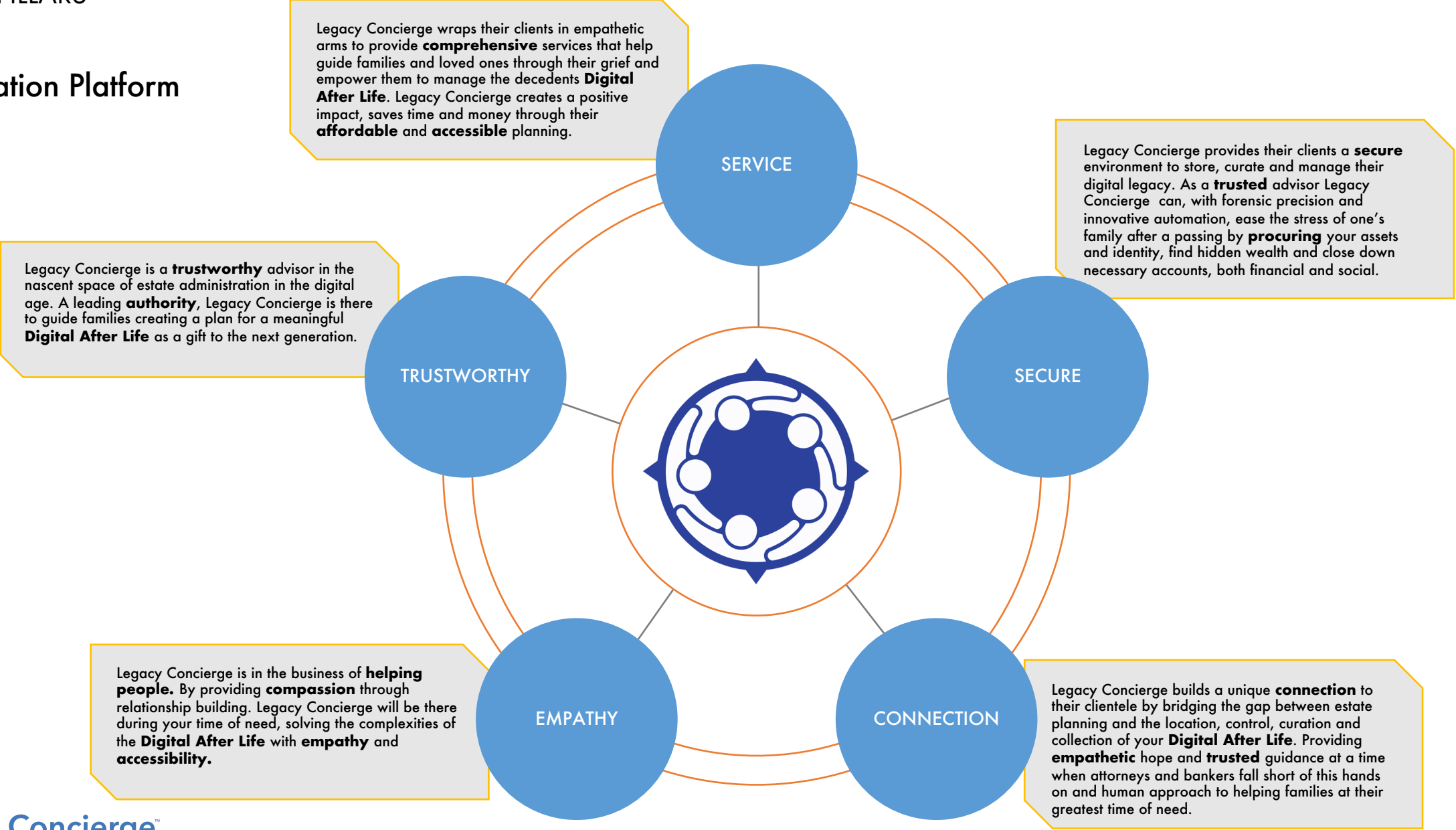
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Empower Your **Digital After Life**

How do you explore mortality? It is difficult to broach the subject, especially with loved ones. There is a positive and healing way to guide this discussion. As Willie Nelson sings, "It's not something you get over, but it's something you get through." The loved ones who are left on the other side of a decedent's passing are often overwhelmed with settling the estate and usually have no idea as to what to do, nor how to do it. To help them get through this fog of tribulation, there is hope. Both in the crisis of the moment and planning beforehand, Legacy Concierge empathetically bridges this gap between estate planning and the location, control, curation and collection for what we call your **Digital After Life**. Death might be inevitable, but how we talk about it and plan for it can be pivoted to accentuate the positive. *Afterlife* connotes **life after death** or **the world to come**. Your **Digital After Life** is your legacy - your last wishes, your assets, your digital footprint. We help people create a plan for a meaningful **Digital After Life** as a gift to the next generation. By providing a safe and secure home for your records and accounts of your assets, your affairs are organized at death so your executor has a comprehensive plan for settling your estate avoiding the costly nightmare for your family of proceeds going to attorneys and taxes. With forensic precision and innovative automation, our services at Legacy Concierge can ease the transition by protecting your assets and identity, find hidden wealth and close down necessary accounts, both financial and social. Empower Your **Digital After Life** with **Legacy Concierge**. Your trusted guide.

BRAND PILLARS

Communication Platform



Vision Statement

To be the leading service that helps define, maintain and preserve the Digital After Life of their clients, globally.

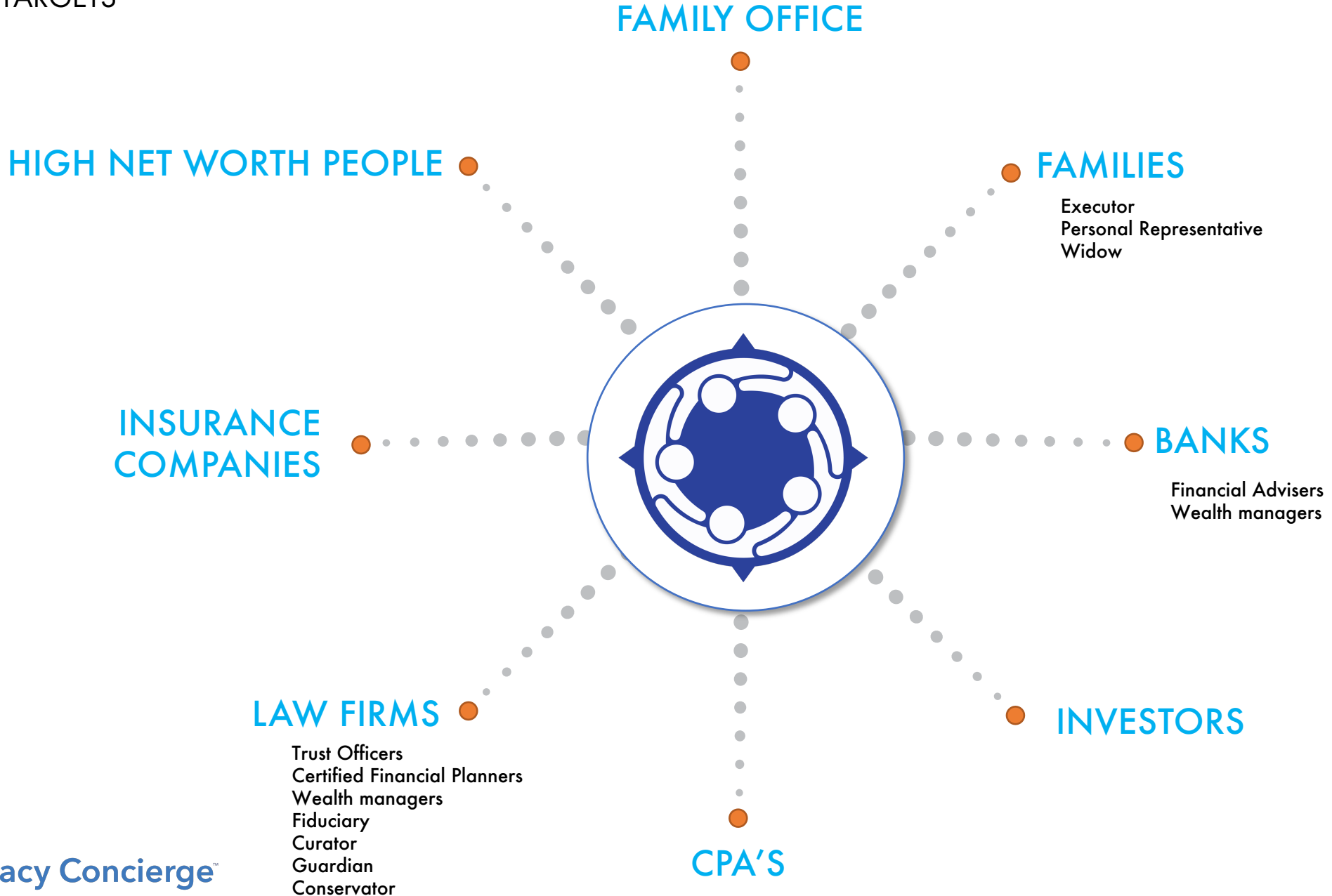
Mission Statement

Legacy Concierge builds a unique **connection** to their clientele by bridging the gap between estate planning and the location, control, curation and collection of your **Digital After Life**.

Positioning Statement

Legacy Concierge is there to guide families creating a plan for a meaningful **Digital After Life** as a gift to the next generation. With forensic precision and innovative automation, our services at Legacy Concierge can ease the transition by protecting your assets and identity, find hidden wealth and close down necessary accounts, both financial and social.

THE TARGETS



THE PERSONAS

ELLSWORTH

HIGH NET WORTH PEOPLE



SHARON

CERTIFIED FINANCIAL PLANNER



MARY

THE WIDOW



SUZANNE

CONSERVATOR



DEBBIE

DAUGHTER/EXECUTOR



JUSTIN

ANGEL INVESTOR



NELSON

WEALTH MANAGER/BOFA



HUNTER

CPA



USER PERSONA TARGETS



ELLSWORTH

Personal Background

Retired business mogul worth \$6M.
Married, 3 adult children.

Business Background

MBA, Wharton. Ran Fortune 500
company as CEO.

Lifestyle

A workaholic most of his career. He
now sails his new sailboat and manages
his portfolio of investments. The family is
not close and his kids are not successful
in their careers, but well educated. Has
homes in Darien, CT and Aspen, CO.

Challenges

He is well invested, has a will and a
trust setup, which he updates every 5
years. Active on Facebook.

Sources of Information

Linkedin, Twitter, CNBC

COMMUNICATION

Your **Digital After Life** is your legacy.
Who will manage your last wishes, your
assets, your digital footprint? We help
people create a plan for a meaningful
Digital After Life as a gift to the next
generation. By providing a safe and
secure home for your records and
accounts of your assets, your affairs are
organized at death so your executor
has a comprehensive plan for settling
your estate avoiding the costly
nightmare for your family of proceeds
going to attorneys and taxes.

DESIRED QUOTE

"I thought I was set up, took
care of my family through my
trust, but Legacy Concierge
showed there is so much to do
to manage my Digital After
Life."

USER PERSONA TARGETS



MARY

Personal Background

Recently widowed. Her husband died unexpectedly from Covid. She thinks there is a will but does not know who their lawyer is. She is peripherally aware of their financial situation.

Business Background

Communications major in college, but did not graduate.

Lifestyle

Recent illnesses have kept Mary inactive and she has rising medical bills. She babysits her grandchildren and is involved heavily with her son's family.

Challenges

Her and her husband had a trust, but separate checking accounts. She has no access to her husband's accounts and has no passwords to any of her husband's financial, investment, social accounts.

Sources of Information

Facebook, Good Morning America

COMMUNICATION

Legacy Concierge is in the business of **helping people** by providing **compassion during probate / after a loss / compassionate support** / through relationship building. Legacy Concierge will be there during your time of need, solving the complexities of the **Digital After Life** with **empathy** and **accessibility**.

DESIRED QUOTE

"I was overwhelmed after my husband's funeral and I did not know where to start or how to start the next stage of my life. Legacy Concierge took charge and showed me my path and managed everything. Their personal attention gave me hope during those dark times."

USER PERSONA TARGETS



DEBBIE

Personal Background

A busy grandmother herself with 2 adult children and 3 grandkids. She has no career but very active with local museums as a volunteer docent. Her widowed mother just passed away, being the only daughter, she became the executor of her will, not knowing what this means nor knowing anything about her mother's finances. She grew up in a rich family but her Father died 10 years ago and he was successful in real estate.

Business Background

Liberal Arts major, graduating from UCLA. She taught history for a few years, but then raised a family and never went back to her teaching work.

Lifestyle

Debbie lives for her grandchildren and is an active runner and camper. She is in great shape physically.

Challenges

Her late mother was not great at financial matters as her husband left a wealth manager in charge at the local bank. Having no access to their accounts, she is confused as to what the next steps are as the designated executor. She was close with her mother and is grieving at her passing.

Sources of Information

MSNBC, Facebook

COMMUNICATION

Legacy Concierge builds a unique **connection** by bridging the gap between estate planning and the location, control, curation and collection of your **Digital After Life**. We provide **empathetic** hope and **trusted** guidance at a time when attorneys and bankers fall short of this hands-on and human approach to helping your family at their greatest time of need.

DESIRED QUOTE

“Legacy Concierge was recommended to me by my mother's financial manager. They meticulously helped me sift through the numerous issues around settling the estate and closing everything down. They even found an investment property in Laguna, CA that my Father had.”

USER PERSONA TARGETS



NELSON

Personal Background

A seasoned financial manager, Nelson made the leap to wealth management and manages 5 high net worth individuals. He has a young family but is a tireless worker.

Business Background

With an MBA from Loyola Marymount, his career at Bank of America started right after graduation.

Lifestyle

With 2 young boys, he is busy in the off hours with little league and Boy Scouts. His vacations are spent back East with his wife's family in Maine.

Challenges

Nelson needs to grow his business as all his clients are aging out. He needs new ways to talk about wealth management to potential clients.

Sources of Information

Wall Street Journal, WSJ.com, CNBC

COMMUNICATION

Legacy Concierge is a **trustworthy** advisor in the nascent space of estate administration in the digital age. A leading **authority**, Legacy Concierge is there as an ally and additional service to guide your client families creating a plan for a meaningful **Digital After Life** as a gift to the next generation. *Grow your services by offering ours.*

DESIRED QUOTE

"I try to tell everyone about this opportunity because it is so good that others should know! Legacy Concierge increased by clientele by 200%. Their services complemented mine, but made a compelling sell to my existing and new clients. Using BofA's digital marketing, I was able to extend my reach nationally with these new services. Legacy Concierge is about helping those in crisis, surfacing new issues, and, most importantly, helping my clients."

USER PERSONA TARGETS



SHARON

Personal Background

As a Financial advisor and CFP® professional Sharon helps clients with investment decisions, taxes, and selecting insurance policies and retirement plans. Her job involves meeting with clients, analyzing financial information, and researching new opportunities. She is single and dedicating to helping her clients in an objective way.

Business Background

With an MBA from Brown, she spent her first 5 years in under-represented communities focusing on helping families and businesses grow. She became a CFP 4 years ago.

Lifestyle

Sharon is a workaholic, but very involved in her Church community.

Challenges

Her empathic approach for an ever-widening gap in financial justice for her clientele, leaves Sharon wanting more services that are automated and serve her grieving community which has suffered many losses due to Covid.

Sources of Information

Instagram, Twitter, NYT.com, CNBC, MSNBC

COMMUNICATION

We can help your clients in unique ways that you currently might not offer. With **forensic precision** and **innovative automation**, our services at Legacy Concierge can ease the transition of a decedent by protecting your client's assets and identity, finding hidden wealth and closing down necessary accounts, both financial and social.

DESIRED QUOTE

“Legacy Concierge has helped all of my clients better prepare their families for a brighter future. Coming out of Covid, my community was devastated, in crisis mode and Legacy Concierge came in and helped in ways that I could not. They have been a great ally.”

USER PERSONA TARGETS



SUZANNE

Personal Background

As a conservator, Suzanne is appointed by the court to take care of someone's finances when he or she cannot make these types of decisions because of an illness, injury, or disability. Because she wanted to help people in a more personal way, she moved from being a CPA to this new role 5 years ago.

Business Background

She received her CPA from USC and an MBA from Wharton.

Lifestyle

A recent widow herself, she is knowledgeable about estate planning and is a dedicated worker. She has a son who is also a CPA.

Challenges

Sharon wants to grow her business and help more people confronted by various life crisis. As her work is referred by the court, she needs to stand out from her competitors.

Sources of Information

The Today Show, Twitter, CNBC

COMMUNICATION

The loved ones who are left on the other side of a decedents passing or incapacitation are often overwhelmed with settling/running the estate and usually have no idea as to what to do, nor how to do it. Legacy Concierge can help Conservators guide their clients to help them get through this fog of tribulation. Both in the crisis of the moment and planning beforehand, Legacy Concierge **empathetically** bridges the gap between estate planning and the location, control, curation and **securing** for what we call the **Digital After Life** of your clients.

DESIRED QUOTE

“What I share with Legacy Concierge is a common goal of helping families in their time of need, when dark clouds of doubt and confusion shroud better judgement. Legacy Concierges empathetic approach dovetails with my credo and together, we are helping families in new ways tackle life’s toughest times.”

USER PERSONA TARGETS



JUSTIN

Personal Background

Justin is passionate about helping people, funding startups and supporting minority businesses. He is married with no kids.

Business Background

As an NYU Grad, Justin made his mark in Mergers and Acquisitions. After exiting 2 startups, he started his own Venture firm that invests \$50M in minority and women owned businesses.

Lifestyle

Justin and his wife invested in real estate and manage many vacation properties and enjoy spending time in those destinations.

Challenges

Justin has altruistic motivations but is extremely smart about his investments and is conservative about where to park his fund. His partners are even more conservative and are always looking for fast exits.

Sources of Information

WSJ.com, LinkedIn, Twitter, CNBC

COMMUNICATION

Legacy Concierge is the leading service that helps define, maintain and preserve the **Digital After Life** of their clients, globally. Invest in a unique company that is filling the void and providing valuable services for high net worth individuals and families at a time of crisis. Using **AI** and **automation**, Legacy Concierge is a thought leader and is innovating effective ways to locate, control, curate and collect untapped wealth for its customers. Their network of CFPs, Wealth managers, CPAs and Financial managers is growing daily. In a post-Covid world, the awareness of the need for estate planning and prepping ones Digital After Life is at an all time high.

DESIRED QUOTE

“Legacy Concierge came to us with a great plan and an even greater market potential. They have solved an unmet need and are positioned for exponential growth and some immediate returns. We invested in them because of their capacity for caring and serving others in times of need.”

USER PERSONA TARGETS



HUNTER

Personal Background

Recently married, Hunter is a dedicated worker. Personable and approachable.

Business Background

He received his CPA from Duke, lived in NYC and started his career with Price Waterhouse and after 2 years, moved out to Albuquerque to work with Moss Adams. He is a director now overseeing a staff of 20.

Lifestyle

He and his wife are athletic and enjoy the outdoors. Both are runners and are happy to be away from the Urban Life.

Challenges

Hunter is ambitious and wants to grow his clientele and staff. He is always looking for new ways to advise his clients. He maintains close relationships and is a trusted adviser.

Sources of Information

Instagram, Twitter, YouTube, WSJ.com, MSNBC

COMMUNICATION

Legacy Concierge can provide your clients a **secure** environment to store, curate and manage their digital legacy. As a **trusted** advisor Legacy Concierge can, with forensic precision and innovative automation, ease the stress of one's family after a passing by **securing** your client's assets and identity, **finding** hidden wealth and **closing** down necessary accounts, both financial and social.

DESIRED QUOTE

"As I am constantly in touch with my clients, through newsletters, webinars and annual tax-planning sessions, Legacy Concierge has been a great ally and a new resource to help in new ways."

LOGO CONCEPT

In revisiting the logo for Legacy Concierge, the idea is to have more meaning behind it and differentiate the company from direct and indirect competitors. As discussed in all of the core truths, core values and vision, mission, and position, Legacy Concierge does have a unique position and the identity needs to also be unique. The concept of the new identity is to show empathy and caring through the use of the interlocking people. Framed by a navigational compass, this unique combination of metaphors provides the essence of the brand. Below are keywords that led to the new identity and inspires newer metaphors and imagery.

GUIDE

COMPASS

HUMAN

EMPATHY

Your Trusted Guide

Death might be inevitable, but how we talk about it and plan for it can be pivoted to accentuate the positive. *Afterlife* connotes life after death or the world to come. Your Digital After Life is your legacy. Your last wishes, your assets, your digital footprint. We help people create a plan for a meaningful Digital After Life as a gift to the next generation. Our services at Legacy Concierge can ease the transition by protecting your assets and identity, find hidden wealth and close down necessary accounts, both financial and social. The brand of Legacy Concierge needs to convey an image **empathy** and **empowerment**. The clientele is vulnerable and grieving. The Brand needs make an emotional connection with the use of imagery and language. Empower Your Digital After Life with **Legacy Concierge. Your trusted guide.**

CORPORATE IDENTITY

ICON



CORPORATE IDENTITY

LOGOTYPE



Legacy Concierge™



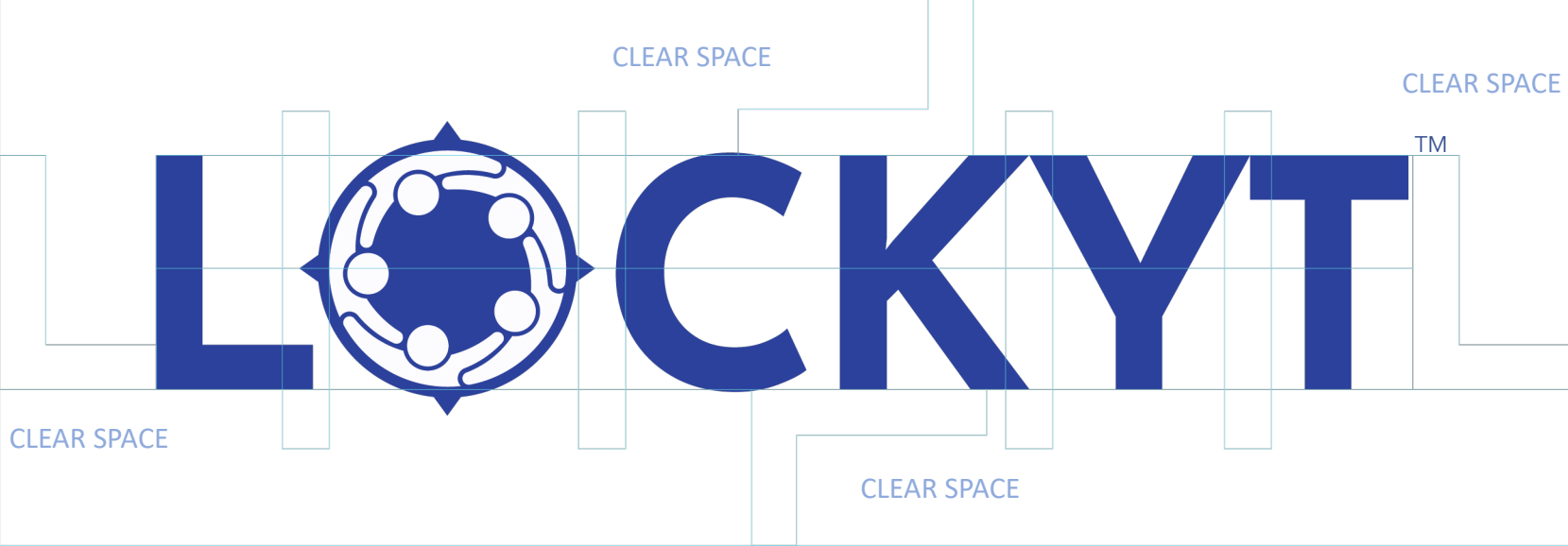
CORPORATE IDENTITY

SUB-BRAND LOGOTYPE

LOCKYT™

CORPORATE IDENTITY

SUB-BRAND LOGOTYPE



Colors

There is a limited color palette for the brand. Brand Blue is the Hero color and must always be used in a corporate environment. The complementary secondary colors should be used conceptually to help differentiate new lines of products and used in the logotype.



Brand Blue

USE: This colors the icon and the sub-brand of LOCKYT. It can also have various transparencies when used as graphic element.

RGB

R - 61
G - 77
B - 157

CMYK

C - 87
M - 74
Y - 1
K - 0

HEX

#3D4D9D



Light Blue

USE: This colors the Logotype in the Lockup. It can also have various transparencies when used as graphic element.

RGB

R - 78
G - 126
B - 190

CMYK

C - 68
M - 41
Y - 1
K - 0

HEX

#4E7EBE



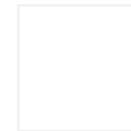
Black

USE: This colors the logotype and body copy. It can also be used as graphic element.



Medium Gray

USE: Various shades of gray, all achromatic, can be part of this family. It can have various levels of transparency, as well.



White

USE: White is the main background when using the icon or lockup.

Fonts

The Avenir Family is a nice sans serif font that stems from the Logotype font, but provides a variety of styles to work in any layout.

AVENIR NEXT BOLD

**ABCDEFGHIJKLMN
OPQRSTUVWXYZ
abcdefghijklmn
opqrstuvwxyz
1234567890**

1.

AVENIR NEXT MEDIUM

ABCDEFGHIJKLMN
OPQRSTUVWXYZ
abcdefghijklmn
opqrstuvwxyz
1234567890

AVENIR NEXT REGULAR

ABCDEFGHIJKLMN
OPQRSTUVWXYZ
abcdefghijklmn
opqrstuvwxyz
1234567890

AVENIR NEXT CONDENSED

ABCDEFGHIJKLMN
OPQRSTUVWXYZ
abcdefghijklmn
opqrstuvwxyz
1234567890

AVENIR NEXT DEMI BOLD

ABCDEFGHIJKLMN
OPQRSTUVWXYZ
abcdefghijklmn
opqrstuvwxyz
1234567890

AVENIR NEXT HEAVY

**ABCDEFGHIJKLMN
OPQRSTUVWXYZ
abcdefghijklmn
opqrstuvwxyz
1234567890**

CORPORATE IDENTITY

BUSINESS CARDS



A business card with a white top half and a dark blue bottom half. The top half features the Legacy Concierge logo (a circle of five hands) and the text "Legacy Concierge™". The bottom half contains the name "Betsy Ehrenberg" and her title "Founder | CEO | Pmd", along with her email "betsy@legacy-concierge.com", phone number "(650) 380-0688", and website "www.legacy-concierge.com".

 Legacy Concierge™

Betsy Ehrenberg
Founder | CEO | Pmd
betsy@legacy-concierge.com
(650) 380-0688
www.legacy-concierge.com



A business card with a white background. It features the Legacy Concierge logo and the text "Legacy Concierge™" in the upper half, and the website "www.legacy-concierge.com" in the lower half.

 Legacy Concierge™

www.legacy-concierge.com



IMAGERY

Use more shots showing the humanity of the situation and works towards a story arc that gives hope with Legacy Concierge as the answer, your guide, your way forward. This will create a stronger connection to the brand, thus connecting in an empathic way, to your potential clientele.

“Emotional images should be recognizing that feelings are eclipsing logic AND that there are emotions that need to be understood and addressed. As an example, I want to remember 'dad' but I cannot locate the photos of him since they are all digital. I want to get these financial accounts identified and closed, but I am too sad to even deal with this. My emotions are paralyzing me from handling important financial, insurance, government issues that require me to 'get my act together'. I am so filled with emotions, sadness, that I cannot think logically and I need help getting things done. The emotions are getting in the way of a structured way to handle the identification of assets and the closure of them as well.”

- Betsy Ehrenberg, CEO



IMAGERY
EMPATHY



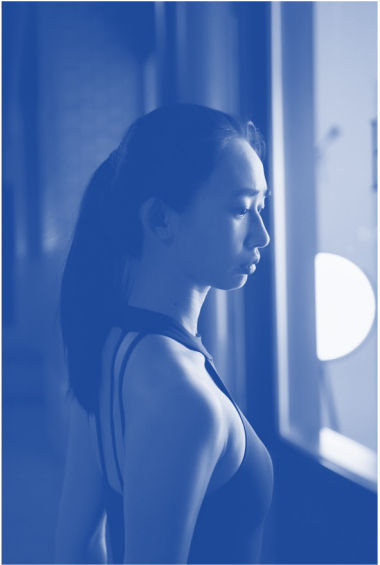
IMAGERY BUSINESS



IMAGERY GUIDE



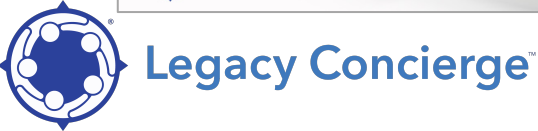
IMAGERY
EMOTIONAL



IMAGERY MONTAGES



SOCIAL SAMPLES



AD SAMPLES



Headline Goes Here

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Legacy Concierge™



Headline Goes Here

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam,

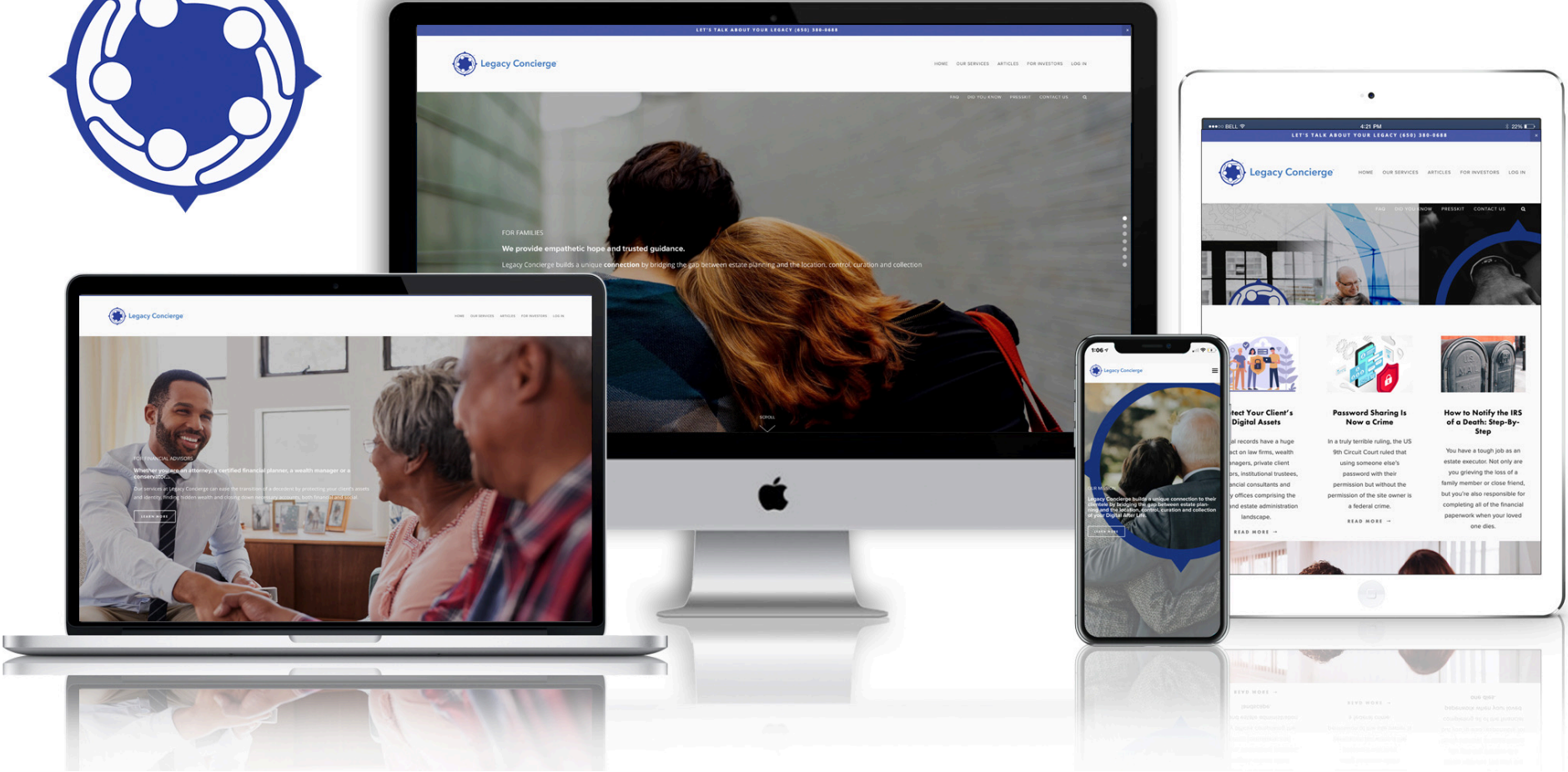


Legacy Concierge™

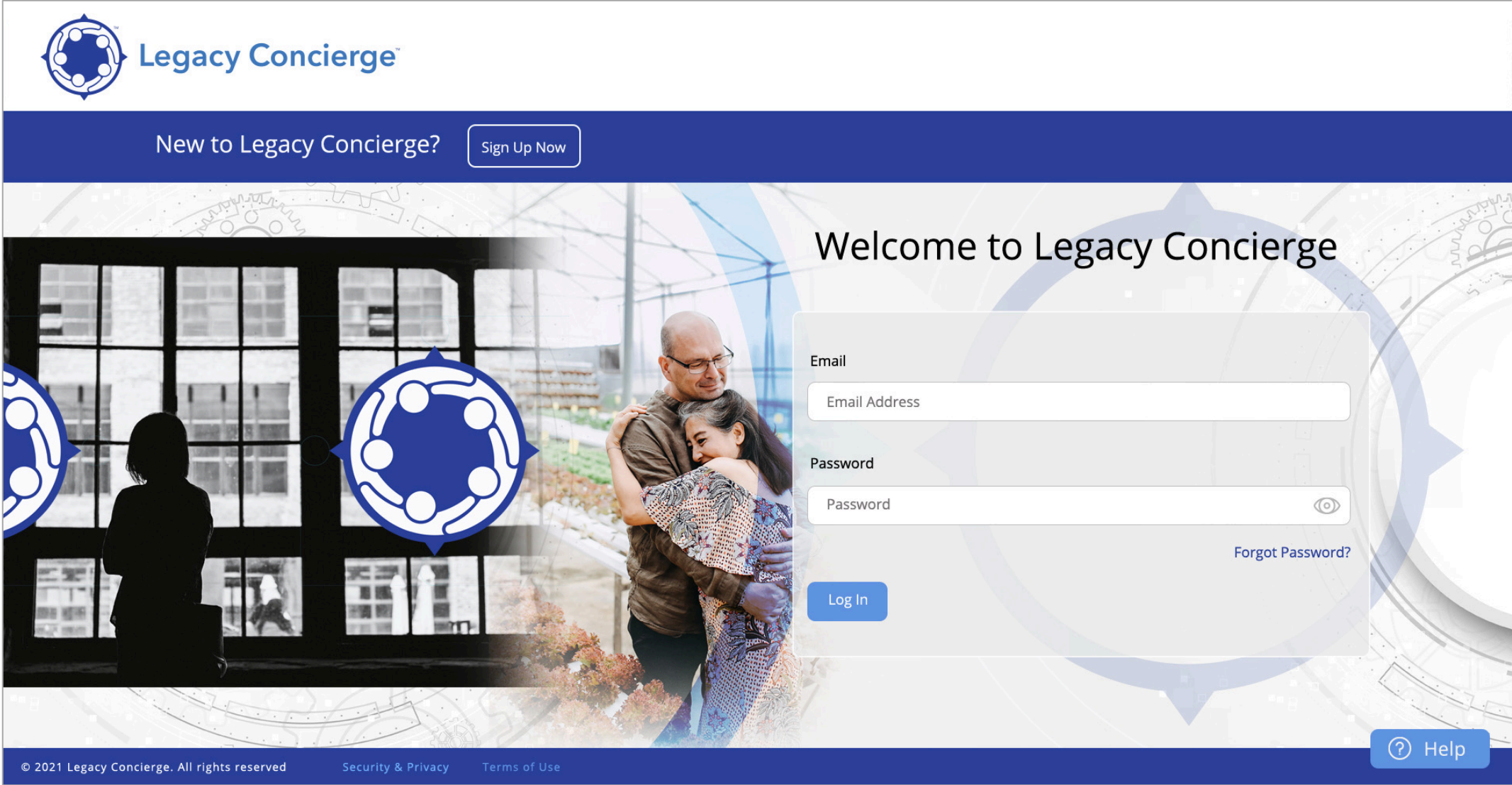
**HOW TO
CLOSE
YOUR LATE
CLIENT'S
ACCOUNTS**



WEBSITE



PORTAL SIGN-IN



The image shows a web portal for Legacy Concierge. At the top left is the Legacy Concierge logo, which consists of a blue circle with white dots and lines inside, resembling a network or a group of people. To the right of the logo is the text "Legacy Concierge™". Below the logo and text is a dark blue horizontal bar. On the left side of this bar is the text "New to Legacy Concierge?" and on the right side is a white button with the text "Sign Up Now". The main content area features a large background image of a man and a woman embracing in front of a large window. Overlaid on the right side of this image is a white login form. The form has a title "Welcome to Legacy Concierge" and two input fields: "Email" with a placeholder "Email Address" and "Password" with a placeholder "Password" and an eye icon. Below the password field is a link "Forgot Password?". At the bottom of the form is a blue button with the text "Log In". In the bottom right corner of the main content area is a blue button with a question mark icon and the text "Help". At the bottom of the page is a dark blue footer bar. On the left side of this bar is the text "© 2021 Legacy Concierge. All rights reserved". In the center are two links: "Security & Privacy" and "Terms of Use". On the right side is a blue button with a question mark icon and the text "Help".


Legacy Concierge™

New to Legacy Concierge? [Sign Up Now](#)

Welcome to Legacy Concierge

Email

Password

 [Forgot Password?](#)

[Log In](#)

[? Help](#)

© 2021 Legacy Concierge. All rights reserved [Security & Privacy](#) [Terms of Use](#)

ASSETS

LOGOS.....[Click Here](#)

 LC_FAVICON.png

 LC_ICON_R.ai

 LC_LOGOTYPE R_WHITE.png

 LC_LOGOTYPE R.png

 LC_LOGOTYPE_R.ai

 LC_LOGOTYPE_R.png

 LOCKYT_P.ai

 LOCKYT_TM.png

STOCK IMAGES.....[Click Here](#)

SIZZLE REELS[Click Here](#)

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