

Chan  
& Naylor

Brand & Marketing Guidelines

Updated July 2014

## CONTENTS

<b>1. Who are the guidelines for? .....</b>	<b>3</b>
Why have brand guidelines?.....	3
<b>2. About our brand .....</b>	<b>3</b>
Who we are.....	3
What we do.....	4
<b>3. Vision, Mission, Position, strapline &amp; values.....</b>	<b>5</b>
Mission.....	5
Vision .....	5
Position .....	5
Strap LineS .....	5
Values .....	6
Our Commitment to clients .....	6
<b>4. Resources .....</b>	<b>6</b>
<b>5. Visual identity .....</b>	<b>7</b>
Logo .....	7
Naming.....	9
For more information, please refer to Chan & Naylor Approved Product List.....	9
Dos and don'ts .....	10
Colours .....	11
Type Faces.....	12
The Faces of Marketing.....	13
<b>6. Language and Tone.....</b>	<b>13</b>
<b>7. Social Media .....</b>	<b>13</b>
<b>8. Public relations .....</b>	<b>14</b>
<b>9. Collateral .....</b>	<b>14</b>
Letterhead & Fax template .....	14
Business cards .....	15
Printed Brochures.....	15
Banners & Signage.....	16
Events .....	17
eMail Signature .....	17
Newsletters and eMail Templates .....	18
.....	18
PowerPoint presentations .....	19
e-Books & BOOKS .....	20

## 1. WHO ARE THE GUIDELINES FOR?

This brand guideline document is written for the benefit of both existing and prospective: Chan & Naylor Joint Venture Partners (JVPs), Chan & Naylor employees and external marketing & creative media agencies.

### WHY HAVE BRAND GUIDELINES?

Much thought goes into the development of branding and creation of logos, colours, font styles and the layout of these elements in templates. The physical hallmarks of our brand and company are mirrored in these elements and it is therefore important to retain their value.

Guidelines are important and ensure the original concept and positioning is retained without distortion or deviation. In doing this we enhance marketing and sales efforts so that effective use of our branding generates a positive impact. Consistency not only acts a visual or subliminal reminder but it also tells people that behind the brand is a company that is trustworthy and professional.

Please refer to the Brand Guidelines at all times when creating documents or artwork for external use. **Always send your end product to CNA Marketing for approval.**

If you are unsure of anything in these Guidelines, please contact CNA Marketing for assistance.

## 2. ABOUT OUR BRAND

### WHO WE ARE

Chan & Naylor is a national property, business tax-accounting and wealth advisory group. We are proudly listed 39th in in BRW's Top 100 Accounting Firms 2013 and the recipient of the prestigious "Fastest Growing Accountancy Firm in Australia" on three occasions (2007, 2008 and 2013)). We have 24 offices conveniently situated in 15 locations across five states: NSW, VIC, QLD, SA and WA.

Since 1990, we've helped our clients grow and protect their wealth by leveraging our experience, expertise and innovations we've developed in wealth creation and asset protection strategies. Our difference is in the growing national representation of the Chan & Naylor Group and the sheer breadth of our capabilities and service offerings in Property and Tax Accounting, Wealth Planning, Estate Planning, Business Advisory, Finance, Auditing, Business Advisory; Self-Managed Superannuation Fund (SMSF) establishment, enrichment and strategy. We've become to our clients a convenient and integrated holistic service point of reference and help them grow and protect their wealth.

Through our partner's passion for property investing, we've created a wide range of innovative and tax effective and tax efficient structures to help our clients successfully Grow and Protect Wealth through real estate investing that can be safely passed down from generation to generation.

Chan & Naylor are the industry leaders in that we are the first and only accountancy firm to have successfully obtained a Product Ruling from the ATO (PR2011/15) and again more recently in July 2014 (PR2014/15) for interest deductibility on borrowed monies to invest in a Trust.

## WHAT WE DO

The Chan & Naylor Group specialises in accounting and financial services for property investors, including high net-worth clients with Self-Managed Superannuation Funds (SMSF) and Small-Medium Enterprises (SMEs).

Through a comprehensive range of wealth management, asset protection strategies and estate planning structures, we are uniquely positioned to support our clients in building sustainable prosperity. We have a dedicated team of specialists in Wealth Planning, Finance, Business Advisory and Auditing that can help our clients achieve their wealth creation goals.

Our experienced trusted *Wealth Planners* at Chan & Naylor Financial Planning offer specific advice to help our clients develop a wealth for life plan for them, their families and their businesses and our Finance strategists at Chan & Naylor Finance help clients untangle their financial mess or simply finance/re-finance their investment portfolio.

### Group core competencies:

- Property specialisation in accounting, taxation & regulatory compliance
- Structure establishment
- Unique products (e.g. Property Investor Trust®, Enduring Family Superannuation Fund™, Business Enterprise Trust™ etc., )
- Financial Planning and strategy development; estate planning and retirement planning
- SMSF: strategy development, establishment, administration and enrichment.
- Finance and mortgage solutions including: investment, re-financing, renovate & develop, trusts financing; SMSF loans, leasing & business, commercial finance
- Business Advisory services: business structure and development, corporate secretarial, cash flow, requirements analysis, virtual CFO and auditing.
- Auditing

**Please refer to 'Go To Market Model Summary' Appendix A for an illustration on Chan & Naylor Group Core Competencies and Market Verticals.**

Each client is assigned a dedicated Client Manager at Chan & Naylor. They are their client's 'Go to Accountant' or trusted advisor that will look after their financial affairs and facilitate higher level support from Wealth Planning, Finance, Business Advisory, Audit and other competency divisions.

We offer prospective clients a 15 minute obligation-free phone consultation with a senior partner. This helps the senior partner evaluate a prospective client's situation and gives the prospect a no-risk opportunity to determine how Chan & Naylor can practically help them advance to the next level.

### 3. VISION, MISSION, POSITION, STRAPLINE & VALUES

#### MISSION

We are in the business of *caring for you, your family and your business from generation to generation with honesty and integrity*. We achieve this through a reliable team of approachable, well educated, caring professionals, dedicated to providing the highest level of customer service. We respect and value each other and our clients.

#### VISION

To be known as the largest national accountancy, wealth planning and finance group that specialises in property, asset and wealth protection.

#### POSITION

We are the leading specialists in property and tax accounting, asset protection and wealth creation strategies.

#### STRAP LINES

Primary Strap Line:

***National Property, Business, Tax-Accounting & Wealth Advisory Group***

Secondary Strap Line:

***Grow and Protect Your Wealth***

Strap Line (used for more emotive campaigns):

***Caring for you, your family & business from generation to generation.***

For general Chan & Naylor material such as brochures, website, email, banners etc:

***National Property, Business Tax-Accounting & Wealth Advisory Group***  
*Proudly Listed 39<sup>th</sup> in BRW Magazine 'Top 100 Accounting Firms, 2013' &*  
*BRW's Fastest Growing Accounting Firm (2007, 2008 2013)*

## **VALUES**

- Honesty
- Integrity
- Respect
- Win-win
- Highest quality of client services
- Don't overpromise and under deliver
- Effective as opposed to efficient
- Seek first to understand before being understood
- Have fun and enjoy a work/life balance

## **OUR COMMITMENT TO CLIENTS**

1. We will look after your affairs as if they were our own.
2. We will act as a buffer between the Tax Department and yourself, handling all queries on your behalf.
3. We will minimize involvement in your affairs from the ATO due to our unique system of checks and balances.
4. We will provide you with free five minute enquiries
5. We will return your calls promptly.

## **4. RESOURCES**

All Marketing Collateral (logos, stationary templates, brochures, ebooks and other material) described herein is available online via the Chan & Naylor Staff Portal [www.chan-naylor.info](http://www.chan-naylor.info).

Please contact Chan & Naylor Marketing for assistance if required.

## 5. VISUAL IDENTITY

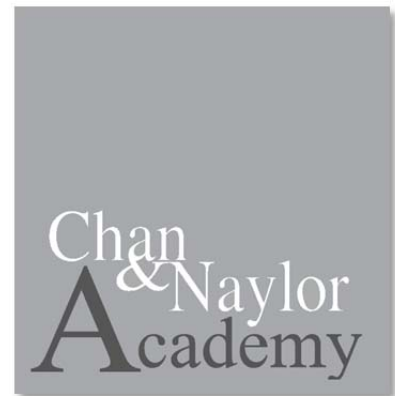
### LOGO

#### Standard / Master Logo

The white on grey logo is used on all printed material, business cards, stationery and signage.



*Chan & Naylor Master Logo*



*Chan & Naylor Academy*

#### Simple, Greyscale

The Greyscale logos is only to be used in situations where the Master logo will not work.



**Alternative Logos** (Suitable for black and white printing on stationary, notepaper etc., )



# Chan & Naylor

# Chan & Naylor

Grow and Protect Your Wealth

## Reverse

The reverse logo is used on all online communications such as websites, email, newsletters.

**Logo with outline of Chan & Naylor text only is also available, suitable for darker backgrounds**

## Insignia

This 'circle' insignia is not a logo but will appear from time to time in brochures and online material.





## **NAMING**

The following Brand names are used in the business:

### **Business Names**

- Chan & Naylor Pty Ltd
- Chan & Naylor Australia Pty Ltd
- Chan & Naylor Finance Pty Ltd
- Chan & Naylor Financial Planning Pty Ltd

### **Product Names**

Including:

- Property Investor Trust<sup>®</sup> Deed (PIT<sup>®</sup>)
- Fixed Property Trust<sup>™</sup>
- Business Enterprise Trust<sup>™</sup> (BET<sup>™</sup>)
- Equity Shift<sup>™</sup>
- Unit Trust<sup>™</sup>
- Property Trust<sup>™</sup>
- Get Smart<sup>™</sup>
- Enduring Family Super Fund<sup>™</sup> (EFSF<sup>™</sup>)
- Allocated Pension Commencement
- Basic Special Purpose Company
- Binding Death Nomination
- Change of Asset Ownership
- Company
- Medical Company Trust<sup>™</sup>
- Discretionary Trust
- EFSF<sup>™</sup> Enhanced Corporate Trustee
- EFSF<sup>™</sup> Optimum Corporate Trustee
- Holding Trust (Incl. Corporate Trustee)
- Hybrid Discretionary Trust
- Investment Strategy

**For more information, please refer to Chan & Naylor Approved Product List**

## DOs AND DON'Ts

Indication of what is acceptable and what is not acceptable in terms of brand usage.

Correct	Incorrect
<b>Logos</b>	
<ul style="list-style-type: none"> <li>Standard logo should be set top left hand corner on letterheads</li> <li>For large format refer to brochure example on page 12</li> <li>Logo must a legible size and of correct proportion (dimensions are a perfect square)</li> <li>Strap line should be one line</li> </ul>	<ul style="list-style-type: none"> <li>Do not change logo colours, size or shape</li> <li>Do not save logos as low resolution files. Always use raw file</li> <li>Strap Line should not be altered unless authorized by CNA Marketing</li> </ul>
<b>Naming &amp; Products</b>	
<ul style="list-style-type: none"> <li>Keep Naming and Product Names consistent</li> <li>Use correct collateral for each area of the business or product.</li> <li>Seek assistance from CNA Marketing if you are unsure</li> </ul>	<ul style="list-style-type: none"> <li>Do not use abbreviations or acronyms unless they exist in these guidelines</li> </ul>
<b>Forms</b>	
<ul style="list-style-type: none"> <li>Save documents as PDF format prior to distribution</li> <li>If a template you need does not exist, please contact CNA Marketing</li> </ul>	<ul style="list-style-type: none"> <li>Never send documents in Word format</li> <li>Do not create new templates</li> </ul>
<b>Email</b>	
<ul style="list-style-type: none"> <li>Marco De Gouveia (<a href="mailto:marcod@chan-naylor.com.au">marcod@chan-naylor.com.au</a>)</li> </ul>	<ul style="list-style-type: none"> <li>Do not send large files over email.</li> <li>Ensure combined attachments are no greater than X size.</li> <li>If a large file or many files needs to be sent, contact CNA IT Department for assistance</li> </ul>

## COLOURS

Please follow this colour guide for all hardcopy and softcopy materials:



### For main logo

CMYK: C = 2.34 M = 1.17 Y = 0 K = 32.94

RGB: R=167 G=169 B=171

Hex: A7A9AB

**For printed materials such as business cards, brochures and signage:**

**Please advise your Print Supplier to print in CMYK.**



### Background Colour to be used on outdoor signage with White Chan & Naylor text

CMYK: C = 7.84 M = 5.88 Y = 0 K = 60

RGB: R: 94 G:96 B:102

Hex: 5E6066

### Font Colouration

*Powerpoint Presentations*

Headings: R: 180 G: 30 B: 66

*Documents*

Headings & Sub-headings R: 126 G: 0 B: 0

## **TYPE FACES**

All marketing material and documents to be used externally must follow the corporate font guidelines:

### **Font Styles:**

#### **Arial**

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

a b c d e f g h i j k l m n o p q r s t u v w x y z

1 2 3 4 5 6 7 8 9 0 ! ? . , ; ' “

Used in our marketing collateral

#### **Arial Bold**

**A B C D E F G H I J K L M N O P Q R S T U V W X Y Z**

**a b c d e f g h i j k l m n o p q r s t u v w x y z**

**1 2 3 4 5 6 7 8 9 0 ! ? . , ; ' “**

Used for all company documentation, communications, headlines and for highlighting key words and phrases.

### **Font Size:**

Body copy font size is usually 11pt. For legibility, do not use a font size smaller than 10pt unless the copy / text is to be used in email or fine print such as privacy statement, policy details in footers etc.

Headings can be larger than 11pt but keep relevant to format size and content.

## THE FACES OF MARKETING

The images you choose reflect on the Chan & Naylor as a whole. Please be conscience of what message you are sending when using images.

Please only use image from the Chan & Naylor library located on the Staff Portal

### Instructions

- Only use images that are relevant to your content and your target audience.
- Do not use unlicensed image i.e. downloads from Google or saved from websites. It is illegal to reproduce someone else's images.
- Do not use low resolution images for printed material. Images to be used for print must be 300pdi.
- For assistance relating to images please contact CNA Marketing to discuss your brief.

## 6. LANGUAGE AND TONE

Always use a professional and confident tone and manner. Here are some example words and phrases that portray our business culture and the way our staff conduct themselves:

- Service oriented
- client oriented
- prompt, and efficient
- under promise-over deliver
- efficient
- responsive
- win-win

### Key Messages

Here are some key messages that you will see being used in various communications:

*'Wealth for Life'*

*'Wealth Creation'*

*'Ask the Expert'*

## 7. SOCIAL MEDIA

Chan & Naylor engage in Social Networking using Twitter, Facebook, LinkedIn and via Blogs. These are updated on a regular basis. Social Media is another marketing channel that helps Chan & Naylor to further engage with clients, prospects and suspects.

By contributing to the ongoing conversation via these sites, we continue to learn more about our audience and in turn they learn more about Chan & Naylor. This creates a two-way relationship and keeps Chan & Naylor top of mind.

If you would like to contribute content for these Channels, please contact CNA Marketing

## 8. PUBLIC RELATIONS

Chan & Naylor engage a Public Relations specialist 'The Narrative' to prepare and send press releases, monitor PR and report. We are involved with all areas of media include TV, print press, online and radio.

Please refer to the Media page on our website for current and previous activity. Please avoid direct media engagement until you discuss the opportunity with CNA Marketing to avoid sending mixed messages or unapproved policies to the public.

If you would like any further information, please contact CNA Marketing.

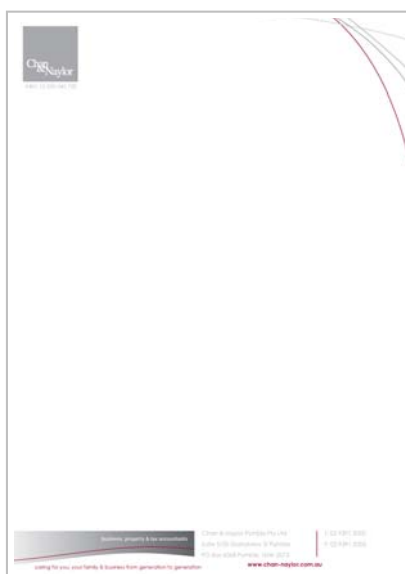
## 9. COLLATERAL

Following are examples of marketing material used by all Chan & Naylor partners, suppliers and staff.

All marketing guidelines, templates and artwork can be found on the Chan & Naylor Staff Portal [www.chan-naylor.info](http://www.chan-naylor.info)

### LETTERHEAD & FAX TEMPLATE

Letterhead



Fax

## BUSINESS CARDS

Business cards are prepared by CNA Marketing. If new artwork is required, please contact CNA Marketing. All artwork can be found in the Staff Portal.



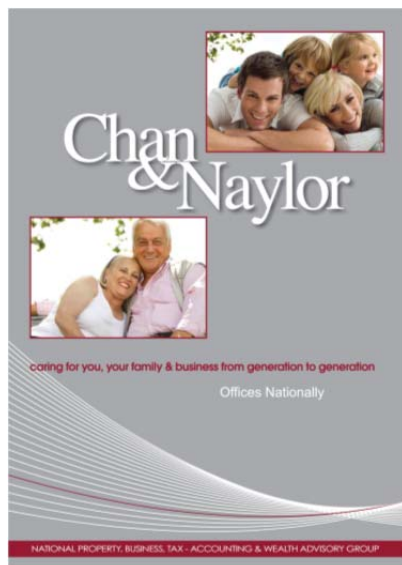
Back



Front

## PRINTED BROCHURES

The corporate brochure is 4 panel A4 format. Do not produce any printed material such as brochure or flyers without permission from CNA Marketing Department.



## BANNERS & SIGNAGE

We have a number of interior and external banner and signs.

### Pull up banner stands

It is recommended for all Chan & Naylor offices to acquire at least 2x pull up banner stands for onsite display in reception areas. These pull up banners will also be used for local seminar events and workshops.



Approx. Standard height: 2100mm

Approx. Standard width: 849mm

Artwork can be found in the Staff Portal ([www.chan-naylor.info](http://www.chan-naylor.info))

### Reception Signs:

All reception areas must have at least one Chan & Naylor logo mounted on the reception desk.

Guideline as pictured below or 5mm Anodised Aluminum with cut out letters.





## EVENTS

Seminars are run on a regular basis throughout the year. The Wealth Retreat is run once a year in May. These events are advertised on our website, online media (Twitter, Facebook etc), PR, newsletters and targeted e-mail sent through Gcast, and our alliance partners.

## EMAIL SIGNATURE

Please follow the corporate guidelines for email Signature. The promotional details (in red) will change according to current marketing activity. Below is an example layout.

**CNA Marketing will advise you on new promotional details for updating in your signature. Please ensure your signature is current so that promotional marketing is maximized.**

Example

Marco De Gouveia  
Marketing Manager  
Direct Line: (02) 9391 5420  
marcod@chan-naylor.com.au  
[Chan-naylor.com.au](http://Chan-naylor.com.au)

Chan & Naylor Australia  
Level 2, Suite 4, 55 Grandview St  
Pymble, NSW 2073  
Ph: 1300 250 122  
[Offices Nationally](#)

**Go beyond just getting a Tax Return!**  
**Discuss a financial road map for your future in a 2 hour Strategic Consultation.**  
**[Click here to find out more!](#)**

[in](#) [t](#) [f](#)

Chan & Naylor  
NATIONAL PROPERTY, BUSINESS, TAX - ACCOUNTING & WEALTH ADVISORY GROUP

2013 BRW Fastest Growing Accounting Firm 2012 BRW Top 100 #39 Accounting Firms

*Caring for you, your family & business from generation to generation*

Standard Firm Policy: The information contained in this e-mail communication may be confidential. You should only read, disclose, re-transmit, copy, distribute, act in reliance on or commercialise the information if you are authorised to do so. If you are not the intended recipient of this e-mail communication, please notify us immediately by e-mail to [info@chan-naylor.com.au](mailto:info@chan-naylor.com.au) or reply by e-mail direct to the sender and then destroy any electronic or paper copy of this message. Any views expressed in this e-mail communication are those of the individual sender, except where the sender specifically states them to be the views of a member of Chan & Naylor Pty Ltd. Chan & Naylor do not represent, warrant or guarantee that the integrity of this communication has been maintained nor that the communication is free of errors, virus or interference. Liability limited by the National Institute of Accountants Scheme, approved under the Professional Standards Act 1994 (NSW).

please consider the environment before printing this email

## NEWSLETTERS AND EMAIL TEMPLATES

The Marketing team prepares and sends newsletters and targeted eMail using Gcast. Following is an outline of current email communications:

### Client Newsletter

Newsletters are prepared and sent on the third Tuesday of each month and emailed to our database of clients and prospects. Newsletters and articles are also uploaded to the CN website. The purpose of the newsletter is to provide clients and prospective clients with current and useful information keeping Chan & Naylor top of mind for all their tax, property investment and financial needs. The newsletter is a way of nurturing the ongoing relationship with clients and forging a trust relationship with prospects to convert them to clients.

CNA Marketing will source content internally and externally. Content is extremely important to the effectiveness of the Newsletter. **If you have any engaging and relevant content you would like to contribute please contact CNA Marketing.** Example of current newsletter (please note, this will be revised in the near future)

### Targeted email template

From time to time email communications will be created to speak to clients and prospects directly about a specific topic such as an upcoming event, change in policy/legislation, tax reminders etc. If you would like to send an e-mail to our clients, please contact the Marketing Department.

### Email / newsletter footer

Where possible, include the following “**Free 10-15 minute call with a Senior Partner**” advertisement in email & mail communications:

A **free 10-15 minute phone consultation** is also provided by the Senior Partners of Chan & Naylor. To register your interest, please go to **[www.chan-naylor.com.au/fsc](http://www.chan-naylor.com.au/fsc)** and complete the online form.

## POWERPOINT PRESENTATIONS

Please use the PowerPoint presentations template in the Staff Portal ([www.chan-naylor.info](http://www.chan-naylor.info)).

Please keep continuity of style where possible.

All completed PowerPoints for public presentation purposes must be sent to CNA Marketing for **approval prior to use**.

### Cover



### Title page



### Inside page

#### Sample Heading

- Sample bullet point
  - Sample
    - Sample
      - Sample
        - » Sample



## **E-BOOKS & BOOKS**

Chan & Naylor have produced a number of eBooks to help guide clients. To access our eBooks, please go to [www.chan-naylor.info](http://www.chan-naylor.info)

Current available eBooks:

- Asset Protection
- Enduring Family Superannuation Fund
- Introduction to Estate Planning
- Is it Ever Too Old to Start Investing
- Main Residence Exemption
- SMSF to Purchase Property
- Working With Others To Buy Property

Hardcopy books:

- Small to GREAT - How to turn your small business into a GREAT Business
- How to Legally Reduce Your Tax – 2011 Edition
- How to Achieve Wealth for Life
- How to Buy Property With Your Super Money

**For all marketing enquiries please contact Chan & Naylor Australia Marketing Department.**

# APPENDIX A: “Go To Market Model”

