

Zimmerman Wealth Management

W E B S I T E D E S I G N

Zimmerman Wealth Management (ZWM) is an SEC-registered investment advisor that helps individuals, families and small businesses better plot their financial futures by helping them address wealth generation, investment, expenditure and bequeathing wealth in the wake of passing. The company does not advertise, but relies strictly on referrals from its client base and other professionals that know the company's approach to wealth management.

The need

ZWM retained Hodge Schindler to help develop and implement a marketing program that included the firm's first Web site in addition to a brochure, letterhead and business cards. The program also included a new logo design to coincide with the company's expansion in Chicago's north suburbs. ZWM wanted the site to inform potential clients of its range of services, while offering updated information to current clients and a system for accessing their accounts online. Additionally, the firm sought a way to help clients enjoy their wealth, either through links to other Web sites that provided advice on living productive lives or through links to reputable, established charities.

Our approach

- Hodge Schindler began work first on designing a logo that would represent the approach ZWM takes with its clients and created an appropriate tagline ("Financial Guidance for the Seasons of Life") that reflected the firm's philosophy toward client services. Once approved, work began on site design (establishing specific areas of the site and the particular aspects of ZWM's operations to be covered) along with prototypes for the look of the site and the brochure.
- We also began work on the graphical elements that would give the new site and the brochure a unique look that would set ZWM apart from other investment advisory firms. The client pitched in by taking digital photographs of the lakefront view from his 17th-floor office in Evanston, Ill., that would provide the site's dominant graphical element.
- Hodge Schindler also researched links to charities and well-living Web sites that would offer a new twist to current ZWM clients and other site visitors. We also handled domain registration, hosting concepts and uploading the site.

The outcomes

- The site, www.zimmermanwealth.com, launched on schedule with the brochures arriving for distribution shortly thereafter. Hodge Schindler designers then delivered letterhead, envelopes and business cards featuring the new logo, tagline and other collateral related graphically to the Web site and the brochure.
- An e-mail blast generated and distributed by the client to announce the launch of the site generated a high response and a surge of visitors to the site. The client reported that new business was generated from site visitors, although he declined to specify actual numbers, given the nature of the business.
- Distribution of the brochure and business cards at various functions visited by ZWM principals assisted in the generation of several leads and the signing of numerous clients who had not previously heard of the firm.
- The profile for ZWM became significantly higher among the targeted audience the company sought to reach, a trend that continued months after the launch of the Web site.