

Marketing Brochure



Introduction to ABC Brothers

Who We Are
ABC & Co. is a multi-generational, privately held financial services holding company committed to providing its clients with the highest level of service.

- Registered Broker Dealer
- Registered Investment Advisor
- Investment Bank
- Merchant Bank
- Mutual Fund
- Insurance Agency

What We Do
ABC Brothers is an independent, privately-owned investment bank offers a comprehensive approach to advise:

- Private Wealth Management (ABC Asset Management)
- Investment Banking (ABC Brothers)
- Merchant Banking (ABC Enterprises)

Our Approach
We strive to accomplish an outcome that is best for a business and its stakeholder the operating experience of our senior bankers, we know well that one size does factors that motivate and drive our clients to engage in a transaction. We satisfy it and closely held businesses, offering trusted advice drawn from generations of experience.

Common Concerns For Business Owners

- Maximizing Value
- Succession Planning
- Monetization Strategy
- Wealth Preservation

Things to Consider

- Securing a Long Term Trusted Advisor**
Do you have a confidant that can act as your sounding board? That understands your business and can provide the best possible advice?
- Assessing all of Your Strategic Alternatives**
Are you able to absorb and process complex financial situations? Should you build vs. buy? Is now a right time to listen to offers?
- Maximizing your Company's Value**
Do you have a complete understanding of what drives your company's value? How can it be best positioned to extract the highest value?
- Making your Business More Attractive to Potential Buyers**
Are you really doing everything in your control to attract potential offers? What are buyers looking for in a potential target?
- Planning for Life Beyond Your Business**
Are you currently set up to provide maximum value and protection for your family? Are you prepared for life after a sale? Are you set up in a way to take full advantage of a major liquidation event? Taxes? Trusts?
- Hiring the Right Advisor**
Are you able to pick up the phone and get all the answers to the above questions on your time?

Key Pointers

Contact us

John Smith President johnsmith@abc.com (999) 999-9999	John Smith Managing Director johnsmith@abc.com (999) 999-9999	John Smith Managing Director johnsmith@abc.com (999) 999-9999
---	---	---

Request and Guidelines Provided

- Reach out to small business owners in North-east USA with an aim to leverage the client's service if they are planning to sell their business
- Shortlist the small business owners in the relevant sectors, prepare an email campaign to share several slides explaining why to leverage the client service, why to sell their business, benefits, needs, requirements, etc.

Methodology and Final Deliverable

- Screened and shortlisted potential small business owners in the industries mentioned, and added their contacts
- Prepared one pagers to highlight the services offered by the client and also on various topics explaining the need, requirements, benefits, and the right time of selling the business
- Client launched the project by sending each one pager out in a given timeline to the shortlisted list of small business owners

Planned and executed a large marketing project for a client with an aim to highlight and make their investment banking services known to potential small business owners and get more M&A opportunities