



# BRANDING GUIDELINES

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REPRESENTING THE EQUIS FINANCIAL BRAND

## CONTACT

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### EQUIS FINANCIAL CREATIVE TEAM

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# INTRODUCTION

The Equis Financial Brand Guidelines serve as the branding roadmap for each and every Equis Financial agent, manager, and executive as they seek to build their own personal brand while maintaining the association and connection with Equis Financial proper. The goal of these Branding Guidelines is to ensure that every representative of Equis Financial is representing both themselves and Equis Financial correctly and professionally.

These Branding Guidelines describe and clearly outline the visual, verbal, and connective elements that represent Equis Financial's corporate identity. This includes, but is by no means limited to, our company name, logos, and taglines.

Apply our guidelines in your marketing and communications materials to ensure a consistent experience across all points of contact with Equis Financial.

***Please note: These Branding Guidelines also apply to all current Equis Financial Divisions including, but not limited to, Equis Advanced, Equis Financial Final Expense, and Equis Latino.***

# LOGO INTRODUCTION

The Equis Financial logo is the key building block of our corporate identity, the primary visual element that identifies us. The signature is a combination of the symbol itself, our company name, and "An Integrity Company" tagline, using a unique font; they have a fixed relationship that should never be changed in any way.

## LOGOTYPE ELEMENTS

The Equis Financial logo is comprised of three elements: the logo symbol, the logo title, and the "An Integrity Company" tagline. The modern and refined logo is presented through the use of color, as well as shape and form. Equis Financial's colors are a clean and appealing blend of blues, teals, and greys that portray a modern, classic, and timeless feel.



### 1) EQUIS FINANCIAL LOGO SYMBOL

Consists of a flared, rounded-corner square with gradient blues, teals, and greys.

### 2) EQUIS FINANCIAL LOGO TITLE

Carefully chosen for its modern, yet refined, highly legible style.

### 3) "AN INTEGRITY COMPANY" TAGLINE

To represent our partnership with Integrity Marketing Group

The main Equis Financial logo is the dark Equis Financial logo used on white or light colored backgrounds. For darker backgrounds, please see our alternative light version below.

### 4) EQUIS FINANCIAL LOGO LIGHT VERSION

To be used with dark background colors.

### RECOMMENDED FORMATS ARE:

.png | .jpg | .ai | .eps

## ATTENTION:

Use of any stylized, animated, hand drawn or other versions of an unofficial logo is not permitted.

Please contact the **Equis Financial Creative Team** at [creative@equisfinancial.com](mailto:creative@equisfinancial.com) if you have any questions or need further help.

## EQUIS FINANCIAL LOGO CLEAR SPACE AND SIZING

It is important to keep all Equis Financial logos clear of any other graphic elements and are kept in a size that is never reduced to be unrecognizable. Whenever you use the Equis Financial logos, they should be surrounded with clear space and kept above 20mm in size to ensure their visibility and impact. No graphic elements of any kind should invade the fixed exclusion zone, which indicates the closest any other graphic element or message can be positioned in relation to the logos.

### MINIMUM LOGO SIZES

**Full Equis Financial Logo:**  
Minimum Size: 20mm x 7.4 mm



**Equis Financial Logo Symbol:**  
Minimum Size: 5 mm x 5.3 mm



### CLEAR SPACE



### COMPUTATION

To work out the clear space, take the height of the Equis Financial logo and divide it in half.  
(Clear space = Height / 2).

## INCORRECT EQUIS FINANCIAL LOGO APPLICATIONS



### DO NOT:

- 1) Invert the Equis Financial logo symbol.
- 2) Alter the Equis Financial logo symbol.
- 3) Alter the logotype style.
- 4) Change the size relationship between the Equis Financial logo symbol and logotype.
- 5) Change the proportions of the Equis Financial logo vertically or horizontally or alter the appearance in any way.
- 6) Customize the Equis Financial logo by adding text or an agency name. See below for proper customization.

## "POWERED BY EQUIS FINANCIAL" LOGO APPLICATIONS



Incorporating the Equis Financial logo into your own business logo can be done by adding a disclaimer before the logo, such as, "Powered By." Equis Financial provides official assets for agents and managers to use in the Equis Brand Asset Library.

- 1) VERTICAL POWERED BY EQUIS FINANCIAL
- 2) HORIZONTAL POWERED BY EQUIS FINANCIAL

## COLOR SYSTEM

Color plays an important role in the Equis Financial corporate identity. A palette of primary colors has been developed, which comprise the Equis Financial color scheme. Consistent use of these colors will contribute to the cohesive and harmonious look of Equis Financial's brand identity across all relevant media.

Usage: Use these colors as the primary palette for all internal and external visual representations of the company.

Light Teal	Medium Teal	Equis Teal	Equis Blue	Equis Navy	Gradient
#0EC3D3	#0098B2	#017290	#00587D	#003A60	
R-14 G-195 B-211	R-0 G-152 B-178	R-1 G-114 B-144	R-0 G-88 B-125	R-0 G-58 B-96	
C-93 M-8 Y-0 K-27	C-100 M-15 Y-0 K-30	C-99 M-21 Y-0 K-44	C-96 M-63 Y-31 K-12	C-100 M-40 Y-0 K-62	

# TYPOGRAPHY

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Typography plays an important role in communicating an overall tone and quality. Careful use of typography reinforces our personality and ensures clarity and harmony in all Equis Financial communications. The primary typeface for all typography is sans serif.

## FONT OPTIONS

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### ROBOTO

Roboto is a sans serif typeface.

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

Direct Download Link: <https://www.fontsquirrel.com/fonts/roboto>

### ARIAL NARROW

Arial Narrow is a sans serif typeface. Arial Narrow is the best preloaded font for Equis Financial typography use.

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

## VERBIAGE AND GRAMMAR

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The goal of this section is to ensure that Equis Financial's taglines and service marks are used correctly, consistently and, of course, in a professional and accessible fashion.

### TAGLINE USAGE

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The most common grammar blunder we come across is that of proper apostrophe usage in reference to Equis Financial's tagline, "The Agent's Company." The apostrophe is to be placed after the word "agent" to create the possessive form of "agent" which, of course, is "agent's." This apostrophe placement is used to show that the "agent" is a member of the "company" in question, Equis Financial's company culture, direction, and priorities are always geared towards the success and wellbeing of our agents and their careers.

- The Agent's Company
- The Agents Company
- The Agents' Company

# INTRODUCTION TO THE USE OF “EQUIS FINANCIAL”

The company name, “Equis Financial,” may not be used anywhere in the naming of your agency, website, domain name, email address or social media pages, with the exception of the tag line: “Powered by Equis Financial” following your personal and/or agency identification.

For this section, we will be using “Jane Smith from Denver” to show examples of agency names, website domains, email addresses, and social media presences that are in compliance or in violation of the Equis Financial Branding Guidelines.

## AGENCY NAMING

The naming of your personal agency brand may not incorporate or include the Equis Financial company name, or any Equis Financial service mark. Rather, we recommend that you focus on your individual brand instead of the Equis Financial company name.

 AGENCY NAMES IN COMPLIANCE  
The Smith Agency  
The Denver Group

 AGENCY NAMES IN VIOLATION  
Equis Financial Denver  
Equis Financial - Smith Agency

## WEBSITE DOMAINS

Your registered domain names or email/web addresses may not incorporate or include the Equis Financial company name, or any Equis Financial service mark.

 WEBSITE DOMAINS IN COMPLIANCE  
TheSmithAgency.com  
TheDenverGroup.com

 WEBSITE DOMAINS IN VIOLATION  
EquisFinancialDenver.com  
TheSmithAgency.EquisFinancial.com

## EMAIL ADDRESSES

Email addresses are not to include any combination of our company name (Equis Financial) or tagline (The Agent's Company).

 EMAIL ADDRESS IN COMPLIANCE  
jsmith@thedenvergroup.com  
janesmithagency@gmail.com

 EMAIL ADDRESS IN VIOLATION  
janesmith.equisfinancial@gmail.com  
janesmith@equisfinancialagent.com

## EMAIL SIGNATURES

Email signatures are not to include the Equis Financial Logo. You may, however, utilize the "Powered by Equis Financial" logo in emails sent from your agent email address.

 EMAIL SIGNATURE IN COMPLIANCE  
 Jane Smith  
jsmith@thedenvergroup.com

 EMAIL SIGNATURE IN VIOLATION  
 Jane Smith  
jsmith@thedenvergroup.com

## SOCIAL MEDIA PRESENCE

The name of your personal agency brand, registered domain names, email addresses, etc. may not incorporate the Equis Financial company name, or any Equis Financial service mark. You may, however, utilize the tagline “Powered by Equis Financial” to allow you, the agent, to benefit from the national recognition Equis Financial receives, while also securing your personal brand identity and independence, allowing you to establish your own name recognition.

 SOCIAL MEDIA PRESENCE IN COMPLIANCE  
The Smith Agency  
The Denver Group  
The Smith Agency - Powered by Equis Financial

 SOCIAL MEDIA PRESENCE IN VIOLATION  
Equis Financial Denver  
Equis Financial's The Smith Agency  
The Smith Agency - Equis Financial

## CREATIVE ASSET DISTRIBUTION

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Equis Financial owns the rights to all audio/video assets released through internal training and/or public channels such as, but not limited to, Equis Financial's company website(s), social media channels, etc. Use of any Equis Financial audio or video asset must be approved by Equis Financial after you have acknowledged our guidelines and have stated that you will not use or alter the assets in any way, shape, or form. Any and all Equis Financial-branded material must be approved by the Equis Financial Creative Team before public utilization and release. For questions, requests, or permissions, please email [creative@equisfinancial.com](mailto:creative@equisfinancial.com)

## THIRD PARTY MARKETING AND DESIGN

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As an independently-contracted sales agent, we understand that your time is incredibly valuable. Many agents and agency managers utilize third-party marketing and design teams in order to fulfill their branding and marketing needs. You are more than welcome to utilize such services, but all proposed materials must be approved by the Equis Creative Team before public utilization and release. Do note that ONLY Equis-branded content will need to be approved by the Equis Creative Team. You will not need to gain approval for anything and everything you create provided the content does not include elements of the Equis brand, such as our logo, symbol, or event-specific logos. Any material which includes any element of Equis Financial's branded content must receive advanced written approval from Equis Financial.

In the case of a third party firm helping to create a website for yourself or your agency, the same guidelines and regulations that apply to branding and marketing assets will also apply here. Guidelines applying to the naming of your website/domain name must be strictly adhered to in order to ensure your capital is utilized correctly and in a manner that will be approved by Equis Financial.

# ACKNOWLEDGEMENT OF EQUIS FINANCIAL BRANDING GUIDELINES

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This form, once completed and submitted, will serve as authorization for the agent to use the specified Equis Financial logo or audio/video asset of their choosing as clearly expressed and stated in the release form below. Once stated and approved, the agent shall be authorized to utilize their preferred logo for purposes of advertising Equis Financial through any electronic, printed, or promotional materials. The logo and/or audio/video assets cannot be modified or altered in any way and may only be used for purposes of promotion under the Equis Financial brand. The logo/assets shall not be used in any manner, which may be considered disparaging or negative. Equis Financial reserves the right to approve all use of its logo/assets and to revoke license to use the logo/assets at any time in its sole discretion.

By signing and dating this release form, you acknowledge that you've reviewed the Equis Financial Branding Guidelines associated with using the Equis Financial logo/assets and fully understand the parameters in which the logo/assets may be used.

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Signature

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Date

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Printed Name

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Email Address

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Phone Number

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Company Name (if applicable)

Please state which Equis Financial Logo you seek to utilize and your intended use with the logo(s).

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PLEASE SEND COMPLETED RELEASE FORM TO <a href="mailto:CREATIVE@EQUISFINANCIAL.COM">CREATIVE@EQUISFINANCIAL.COM</a>
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