

*charles* SCHWAB

**IMPACT**™2010 + **Advantage**™2010

Visual & Verbal Theme Guidelines, Templates and Toolkit

Established April 2010

be bold

## IMPACT® & Advantage™ 2010 Concepts

PRIMARY VERBAL THEME:

### Be Bold.

A new decade calls for new thinking. At IMPACT & Advantage 2010, you'll hear visionary presentations on strategy, policy and market trends. Be challenged by more sophisticated education sessions with deeper insights. Be connected through shared experiences at special events and receptions. Stay ahead of the curve with the resources and connections available in The Expo. Take command of your future. **Be there.**

We have also developed elevator pitches to help you communicate with different sets of people.

**For advisors:**

Be bold. In growing your client base. In making new contacts. In discovering new opportunities and markets. In positioning your firm competitively. In new techniques and technologies. In every way that IMPACT can help your firm be stronger, smarter and more successful.

**For independent retirement plan providers:**

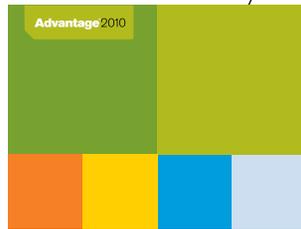
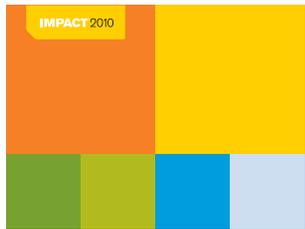
Be bold. In making new contacts with peers and advisors. In discovering new opportunities. In demonstrating your expertise. In positioning your firm competitively. In serving your clients. In advocating for the retirement industry. In every way that Advantage can help your firm be stronger, smarter and more successful.

**For exhibitors:**

IMPACT's theme this year is "be bold." In an industry that's being redesigned, you have to be audacious. Nimble. Adventurous. You have to push past expectations to create new possibilities. Our key message to attendees is that everything they need to succeed will be at the conference—including you.

## IMPACT & Advantage 2010 Style Overview

The overall look-and-feel for IMPACT & Advantage 2010 is, well, BOLD. Strong colors, large fields of color, lots of white space, and photography of active, daring people underscore the verbal theme. Clouds of bubbles, smaller in the “distance” and larger in the “foreground” add a sense of movement and active dialog.




**be engaged**

IMPACT 2010 will be an entrepreneurial event of staggering proportions for investment advisors. It's where your customers will be. It's where the resources and networks your firm needs will be. It's where your competition will be. Be there.



**be dedicated**

Today, investors and clients simply need more.

Be here, for them. Be here for their short-term concerns and their long-term goals. This year IMPACT is committed to deliver more actionable information, techniques and technologies to help you and your business to be there – for your customers, and for the long haul.



**be nimble**

IMPACT promises to deliver actionable information, expert advice and game-changing technologies to jump start your business.

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## IMPACT & Advantage 2010 Verbal Theme

In addition to Be Bold, you may use these hero lines as different subjects suggest. Use title case when writing these hero lines in headlines. The type in the campaign lockup is set in lowercase (see page 6).

- **Be Engaged**  
*In dialog with Schwab*
- **Be Nimble**  
*In adapting to change*
- **Be Dynamic**  
*In exploiting new technologies*
- **Be Compelling**  
*In presenting new ideas*
- **Be Mobile**  
*To connect with clients*
- **Be Notable**  
*Among your peers*
- **Be Influential**  
*Among advisors*
- **Be Visionary**  
*In adopting new strategies*
- **Be Connected**  
*To a world of new ideas*
- **Be Dedicated**  
*To your clients' needs*
- **Be Involved**  
*With the greater community*

When appropriate, sign off with  
**Be There**

# be bold

be engaged

be influential

be nimble

be visionary

be dynamic

be connected

be compelling

be dedicated

be mobile

be involved

be notable

## Lockup Correct and Incorrect Usage

We hardly think you need to be told this, but please leave the basic form of the lockups alone. Skewing, inverting, setting at an angle, using off-palette colors and so on are all Don'ts.

That leaves you with plenty of options to keep things lively.

OK >

1. Use the artwork as provided or bring the bubbles in from any angle you'd like. It's ok to change the "be bold" section to green or blue
2. We also like to use the lockup without the bubbles, simple and bold

DON'T >

1. Turn the lockup upside down
2. Skew, tilt or transform the logo
3. Use colors outside of color palette
4. Change the angles of lockup
5. Change the size relationships of each element
6. Deconstruct the lockups

OK > 1



OK > 2



DON'T > 1



DON'T > 2



DON'T > 3



DON'T > 4



DON'T > 5



DON'T > 6



## Overlaying Bubbles on Photographs

Combining graphics and photography can be tricky, so we've set a few guidelines.

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YES, YES, YES

1. The be-bubble-and-word lockups are always solid. They are bright enough to stand out on our tinted photos.

The bubble clouds are used in two ways:

2. On light colored photos, use the multiply tool in Photoshop to turn the bubble clouds into transparent overlays that let the background show through.
3. On dark colored photos, leave the bubble clouds opaque so they stand out against the background.

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NO, NO, NO

1. Don't multiply the be-bubble-and-word lockup to make it transparent.
2. Don't use opaque bubble clouds on light backgrounds.
3. Don't multiply bubble clouds on dark backgrounds to make them transparent.

OK > 1 Preferred Usage



DON'T > 1



OK > 2



DON'T > 2



OK > 3



DON'T > 3



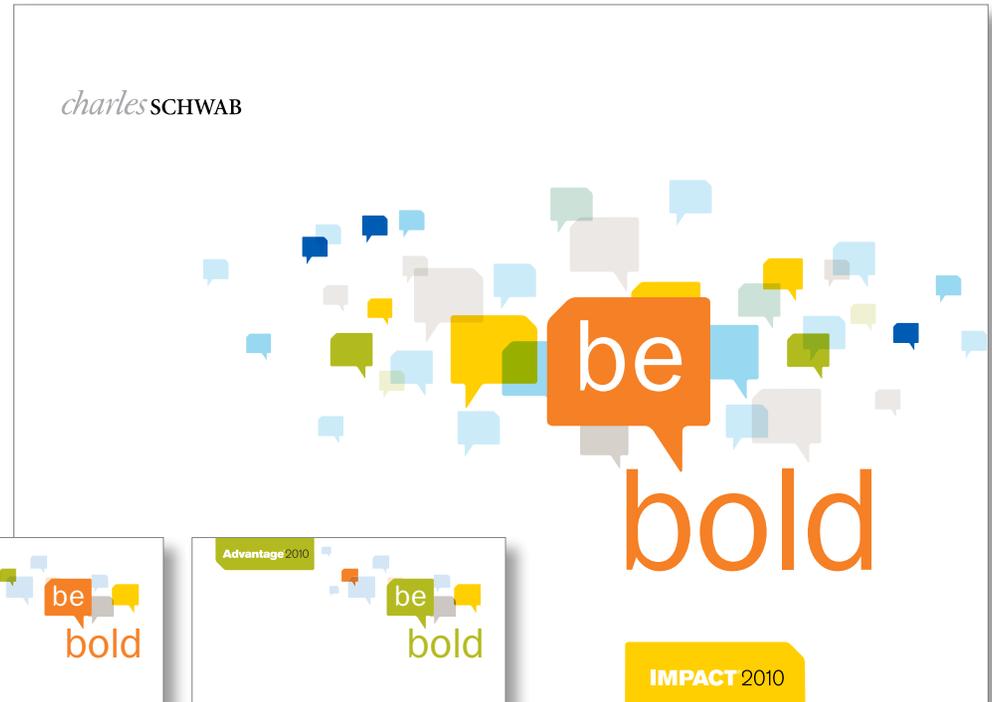
## IMPACT & Advantage 2010 Examples

Leave lots of white space. Organize content in well-defined blocks with a clear visual hierarchy. Ransack the image library for photography. Establish primary and accent colors clearly.

Basically, we're asking for good Modernist design.

One special note:

For headlines using the "be" phrases, we're using the same proportions as the "be bold" lockups. The easiest way to keep this rule is to take the lockups and change the second word, leaving the type sizes and relationships the same.





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IMPACT 2010


**33c**

**10:15 a.m.–11:30 a.m.**  
Defining a Strategy to Navigate the Emerging Environment

**2:00 p.m.–3:15 p.m.**  
Schwab Center for Financial Research: Research and Resources for RIAs

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