

CREATE

Creative Brief

Project: eWomen Network Success Summit Presence

BRAND STATEMENT: Kirkpatrick CPA is the trusted CPA of choice for individuals and businesses, providing professional tax compliance, tax planning, estate planning, and integrated business improvement solutions. We come alongside our clients and make them more financially successful, strategically sound, and confident that they are achieving their life goals and desires.

CONTEXT / BACKGROUND / OPPORTUNITY: We are the bag sponsors at a summit with the theme "S.C.A.L.E." With the bag sponsorship, we get a showcase table, a bag insert, and four social media posts. The event is Feb. 12, just a couple of days before Valentine's Day.

TARGET AUDIENCE: female business owners and entrepreneurs - some use CPAs, and some do not. All are juggling different hats, and they can significantly free themselves up to focus on what they love to do rather than try to "make it work" - especially in the financials of their business. They may have someone taking care of their tax compliance - but what about smart tax planning and truly having an expert take care of these things for them - a "nerd in their back pocket," if you will? Some may have questions: when should I hire a CPA? Why do I need one?

MARKETING OBJECTIVES:

- To present ourselves as an expert in the field (intelligent and experienced)
- To point out clients' need for tax planning
- To educate current clients on the offerings available to them and their high relevance to their potential success
- To give them the idea that we can be their trusted business advisor

CONSUMER MESSAGE: You wear a lot of hats, but to scale up, you need to nerd up! Tax planning and having an expert on the quantitative aspects of your business is one major step to take to get there. Whether you're just starting out or have been in business and growing for a few years, now's the time for a CPA and trusted advisor.

KEY BENEFITS: Increased tax benefits, cash flow, actionable measures for growth and performance, planning, accountability, strategic vision

COMPETITION: We do not just provide retrospective tax compliance. We offer proactive analyses of your business and forward-thinking strategy.

Unlike generalists and business coaches, as a CPA firm, we understand the numbers. We have a solid grasp of the key drivers of revenue and profit and the importance of working capital management.

Unlike the stereotypical analysts and number crunchers who get lost in the weeds, we approach your business with a visionary, high-level orientation. The important thing is that there is meaning to the numbers, and we always have the big picture in mind.

We are smart - we are nerds - obsessive experts who are a bit quirky - and we own it.

ADVERTISING TONE: Confident, quirky, understanding partner, from one business owner and family person to another business owner and person with life goals and values

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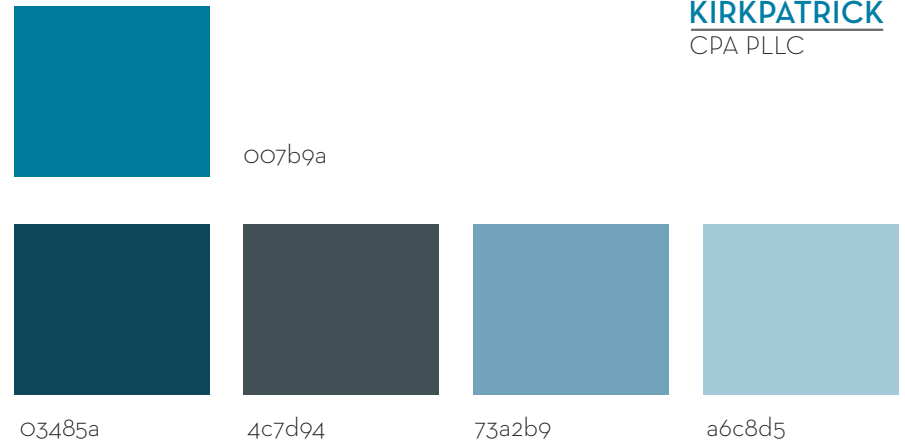
MANDATORY ELEMENTS: logo, big vision and concrete details, clean professionalism / straightforward and not too “slick,” sensibility of long-term partnership

POTENTIAL ANALOGIES FOR WRITING / ILLUSTRATING:

- Nerdy animals
- Valentines - nerds together
- Fear of Missing Out (FOMO) - tax planning
- Nerd in Your Back Pocket - Trade your financial hat for this
- More Than Your Tax Nerd
- Your Tax and Business Nerd

VISUAL DEFINITION (FONTS, COLORS, LOGOS):

Neutra text



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