

FSF Agency of the year 2020/1

Simple ideas for a complicated world





AML is an independent agency specialising in simple ideas for complicated businesses. That includes award-winning work for some of the biggest names in financial services like Barclays and Vanguard, in the UK and around the world.

During 2020/1 we created the UK's most successful-ever investment campaign, won awards for innovation, won big-name new clients, maintained sparkling performance and a strong culture despite the pandemic, and showed our clear commitment to sustainability, inclusion and excellence in financial services.

This has to be AML's year.

Q1

Describe some of your notable recent financial services marketing campaigns, projects or initiatives. What did they achieve? What made them successful?

Creating 'The Nike of investing'

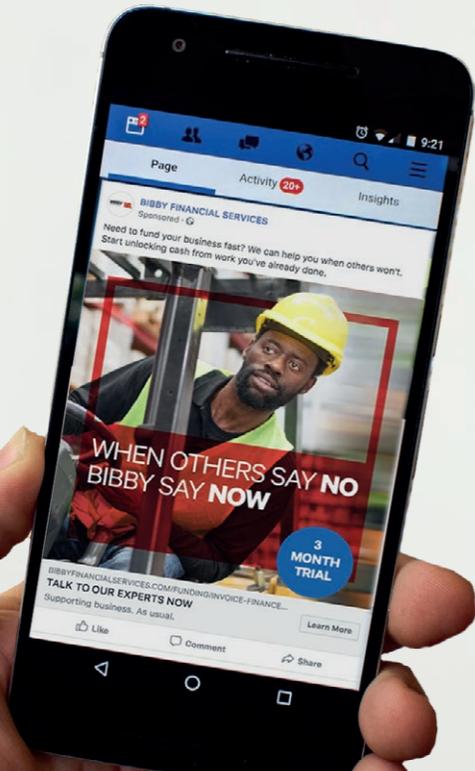
The FSF gave AML's hugely successful 'V for Value' campaign for Vanguard 'Best Strategy' gold at their latest 2020 Marketing Effectiveness Awards along with a commendation as Best Digital Campaign. The judges were impressed by its clarity, simplicity – and of course effectiveness. Our work has delivered staggeringly good results for the firm over the year and helped savers across the UK get better value from their investments. As well as many other awards the campaign has won sparkling praise in the media and from commentators, with Investment Week saying the Vanguard brand had become 'the Nike of our industry'.

- Winner FSF 2020 Marketing Effectiveness and many other awards, continuing to deliver extraordinary results for the firm, for advisers and consumers in 2021



and other successes

That's far from AML's only achievement in this challenging pandemic year. At the start of lockdown, small businesses across the UK were running out of cash; banks weren't lending and government help hadn't yet arrived. So we approached Bibby the SME financing firm with a simple idea for a complicated situation; we saw that Bibby's products like invoice financing could help save struggling businesses. They agreed, we created a digital and outdoor campaign fast ... and unlocked much-needed financial support across the country. It was an early win against the Covid crisis.

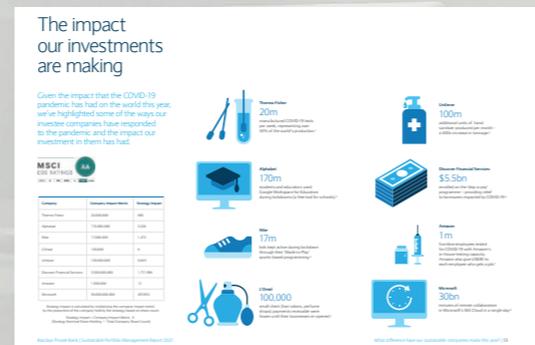


AML initiative successfully helping Bibby support small businesses across the UK through the global pandemic



There's more

We became the global agency for Barclays Private Bank after a five-way pitch, with an innovative approach to their content and communications. Our 'Investigator' platform for BNP Paribas continues to find insights behind investment. We reinvented Robeco's global integrated campaign and helped the firm take the number one position as Europe's leading sustainable investment firm this year.



Are plant-based foods the new food revolution?

Thursday June 24th, 2021

The food industry is poised for disruption. As with other disruptive trends, technology is a key driver of this potential change thanks to rapid developments in alternative proteins or plant-based foods. However, changing consumer preferences are also accelerating demand for alternative food options, thanks to growing concerns about the health consequences of eating too much meat, its impact on climate change

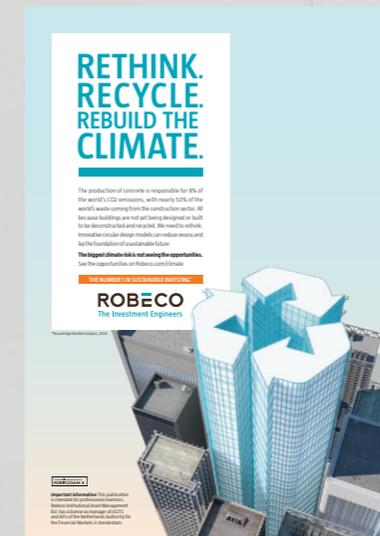
IS ONE EARTH ENOUGH TO KEEP US GOING?

We're consuming 160% of the Earth's resources annually



ONLY 13% OF FORTUNE 500 CEOs ARE WOMEN

The UN goal is to have 50% by 2030. Is gender diversity improving fast enough?



No.1
Sustainable Investor
in the annual
Fund Brand 50

Barclays: integrating content, social, advertising and more for the global Private Bank

BNP Paribas: Investigator content platform helps investors look beyond the news headlines

Robeco: taking the firm to number one for sustainable investing across Europe (Broadridge FB50)

Q2

How have you helped clients develop products or services in recent years that generate long-term sustainable growth?

MAKE YOUR ISA COUNT FOR MORE
FOR YOU, FOR THE PLANET AND FOR EVERYONE

Think investing for positive environmental and social impact means less returns? Think again. On The Big Exchange, you'll only find independently-rated impact funds from the biggest names in sustainable investing, with charges among the lowest you'll find anywhere. That means more for you, more for the planet, and more for everyone else.

Make more of your ISA – open/transfer before 5th April

Search The Big Exchange ISA

THE BIG EXCHANGE
WHERE MONEY COUNTS FOR MORE

Capital at risk
The value of your fund can go down as well as up. The treatment depends on an individual's circumstances and may be subject to change.



Meanwhile, at the FSF's awards for Innovation, AML took another gold – this time the special Judges' award for The Big Exchange (and a special mention for diversity and inclusion). It's a project we've been working on alongside The Big Issue magazine, tech provider FNZ and a number of leading asset managers and we're very proud to say it went live at the beginning of 2021.

The idea behind The Big Exchange (TBE) is to create a platform where people's money counts for more; the first impact-only direct to consumer investment platform, so savings are doing good for others and the planet; an open banking app that helps people manage their everyday money; products and tools that give everyone access to fairer financial services like loans and energy plans. A recent oversubscribed crowdfunding round will fuel the next stage of long-term sustainable growth.

As well as being part of the team from the outset, AML has worked with TBE to build the brand and connect with customers across digital, social and print with much of our time being given pro bono.

WINNER
Best Innovation in Investments
The Financial Services Forum
2021 Awards for
Innovation

bOring
BEST FOR
SUSTAINABLE
ISA
2021

GOOD WITH MONEY
HELPING YOU GET ON TOP

The Big Exchange: Winner FSF 2020 Innovation Awards and many more, successful crowdfund launch

We've also invested our time and resources in the Investor Index, a research programme with The Nursery – now in its third year – which is made available to our clients and others as a service to help them understand how the current crisis is changing behaviour.

Investor Index: AML's own research into investor and adviser attitudes, made free to the industry

THE INVESTOR INDEX
THE SEARCH FOR A NEW STABILITY
REPORT JUNE 2021

ARE BOOMERS BUST?
JOIN OUR WEBINAR TO FIND OUT
REGISTER HERE

ARE FINANCIAL ADVISERS UNDER THREAT?
JOIN OUR WEBINAR TO FIND OUT
REGISTER HERE

And of course, part of our work with clients like Barclays, Vanguard, AXA IM, Robeco and Pictet is to define and develop new ideas that help them drive their own long-term sustainable growth as businesses.

Long-term growth:

- Pictet MEGA (four years) has taken the firm to #4 in Broadridge FB50
- Robeco (six years) from #15 to #5 brand and #1 for sustainability in FB50
- AXA IM (five years) shifted focus to sustainability as aligned brand worldwide

Q3

How does your agency support the improvement of financial services marketing?

OUR THREE SIMPLE PANDEMIC PRINCIPLES

1
KEEP OUR PEOPLE SAFE



2
PROTECT THE BOTTOM LINE



3
DELIVER FOR OUR CLIENTS



We are an independent, owner-managed agency based in London, creating 'simple ideas for a complicated world'. We work with clients from start-ups to global giants, and the financial services world has certainly got a lot more complicated over the last eighteen months. Our task is to keep delivering better marketing in financial services.

For many agencies simply surviving through the pandemic has been challenge enough. We have been fortunate; by focusing on three simple principles (**1** keep our people safe, **2** protect the bottom line, **3** deliver for our clients) we have not only avoided layoffs and furloughs, but have experienced our best first quarter ever. We have even started using our new collaborative workspace in Shoreditch to hold client events and seminars, and our internal approval rating for how we've handled the crisis is 96% positive.

That robust approach has enabled us to continue with supporting the career development of our people (we have a low staff turnover), as well as doing everything we can to maintain engagement and keep the fun stuff going – cook-offs, step competitions, creative showcases, daily check-ins, mental health support and even a virtual pub, the AML Arms.

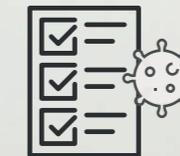
Our talented people create ideas like The Big Exchange and our lockdown campaign for Bibby. We're in the third year of the Investor Index, our research initiative to help financial firms track consumer and adviser sentiment. We're helping UBS pioneer female financial inclusion. And we're sponsoring a local photography competition to bring new talent into the industry.

It's all part of our determination to define innovative solutions and reach new standards in financial services marketing.



- Opening our space in Shoreditch to others
- Getting recognition for supporting our staff

- Supporting gender inclusion with UBS
- Fostering creativity in the local community



96% APPROVAL
ON HOW WE HANDLED THE COVID CRISIS



Q4

What impact has your agency had on the financial services industry in the last 18 months?

AML – redefining the sector, taking the initiative, having an impact

AML's work with Vanguard has been widely seen as one of the most significant recent launches in UK financial services. Bringing low cost, high service investing and advice to a mass audience for the first time is transforming the industry as well as the opportunities of hundreds of thousands of people. It has at last brought wealth marketing into the mainstream, integrating TV, outdoor, radio, digital, social and content. It's won awards for strategy, creativity and effectiveness.

We have been making an impact in other ways, too. Our powerful global campaigns for Robeco have brought issues critical to the future of the planet to a wider audience, from palm oil substitutes to recycled buildings. It's also propelled Robeco to

#1 sustainability brand in the latest FB50 rankings.

Financial services is critical in enabling humanity to address pressing social and environmental issues. Our work with Robeco, BNP Paribas and Barclays Private Bank is helping those firms to make a real difference, as well as defining how the industry communicates in new ways. Through our Investor Index initiative, we are speaking up for the key role that advice must play in securing the financial future of the next generation. And with the launch of The Big Exchange, our shared initiative with The Big Issue and others, we have created the world's first impact-only consumer investment platform.

Over the past year or two we've made more of an impact than ever on the way our industry is investing, communicating and working together to save the planet. More reason that AML should be FSF Agency of the Year in 2020/21.

- The most significant FS campaign of 2020/1 – Vanguard
- Innovation in impact investing and inclusion – The Big Exchange
- Initiatives to support the sector and customers – Bibby, Investor Index
- Long-term sustainable growth – Pictet, AXA IM, Robeco...
- Improving FS marketing with training, diversity, inclusion

← 1.05





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complicated world