



moreish

# WHY WE'RE FINANCIAL SERVICES FORUM AGENCY OF THE YEAR 2021

## **MONEY TALKS. BUT DO PEOPLE LISTEN?**

All brands need to make an emotional connection with their audience – whether they're consumers, or top-level business executives. But this fundamental idea is often forgotten in the complex world of financial services.

We're here to change that. At Moreish, we help FS brands tell human stories, delivering a message that will capture people's hearts as well as their minds.

IT'S FINANCE WITH FEELING

WATCH OUR SHOWREEL

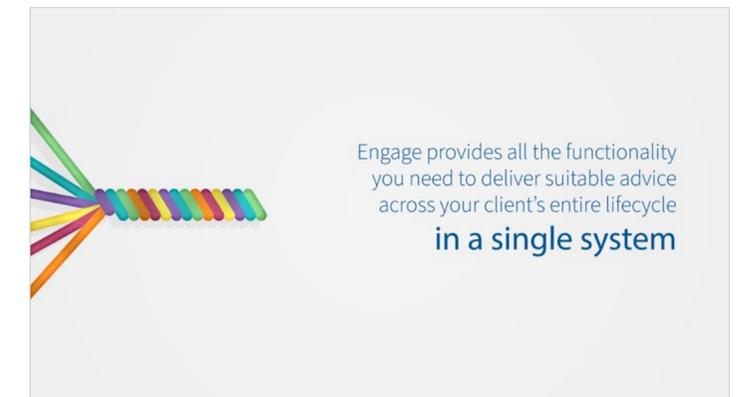
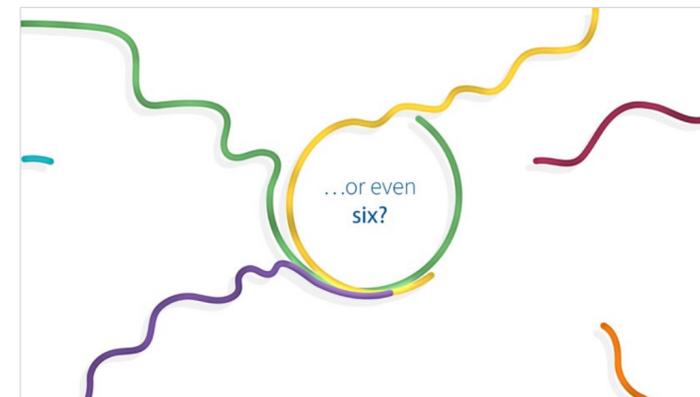
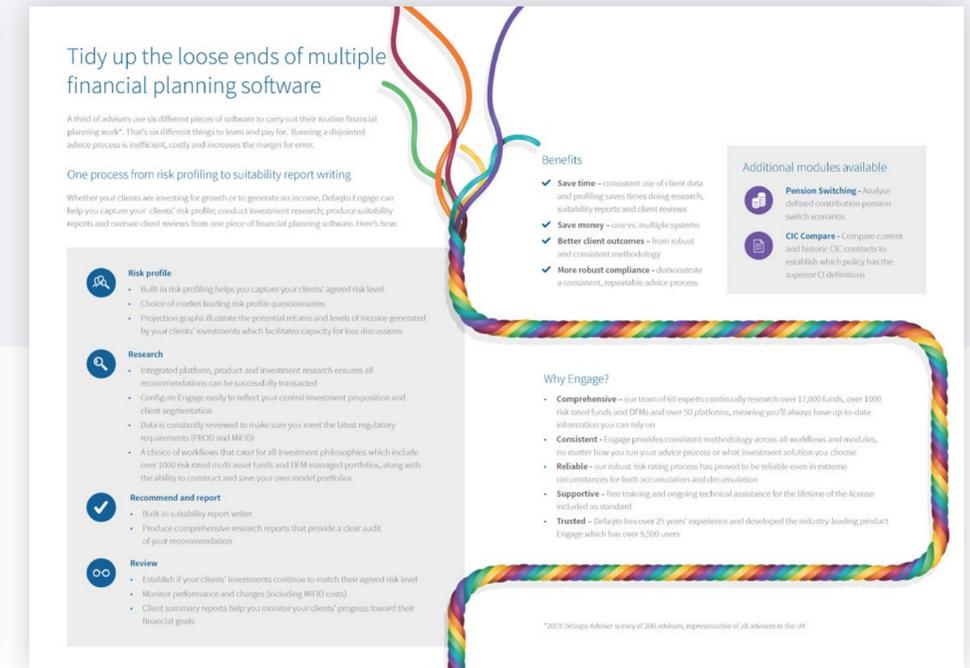
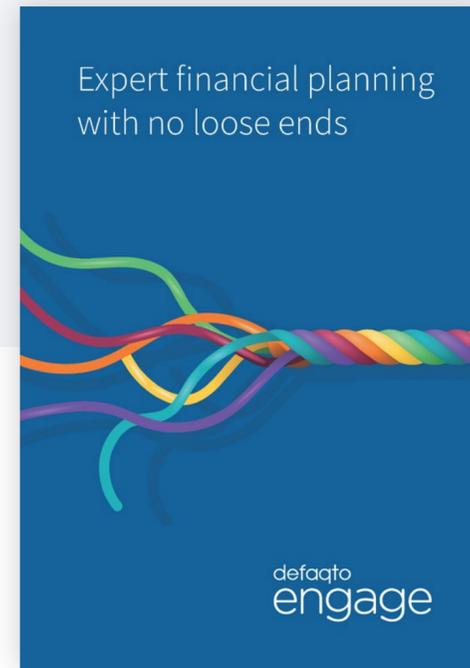
## MARKETING ACTIVITY

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

### Defaqto Engage

The integrated brand campaign for the Defaqto Engage financial planning software, born out of adviser pain points, smashed all its marketing and sales targets. Research showed a third of advisers use six different software systems during their advice process. That's six different systems to learn and pay for, making it inefficient, costly and increasing the margin for advice errors. To bring out the clear USPs of Defaqto Engage, we developed a clear single-minded proposition: Expert financial planning with no loose ends.

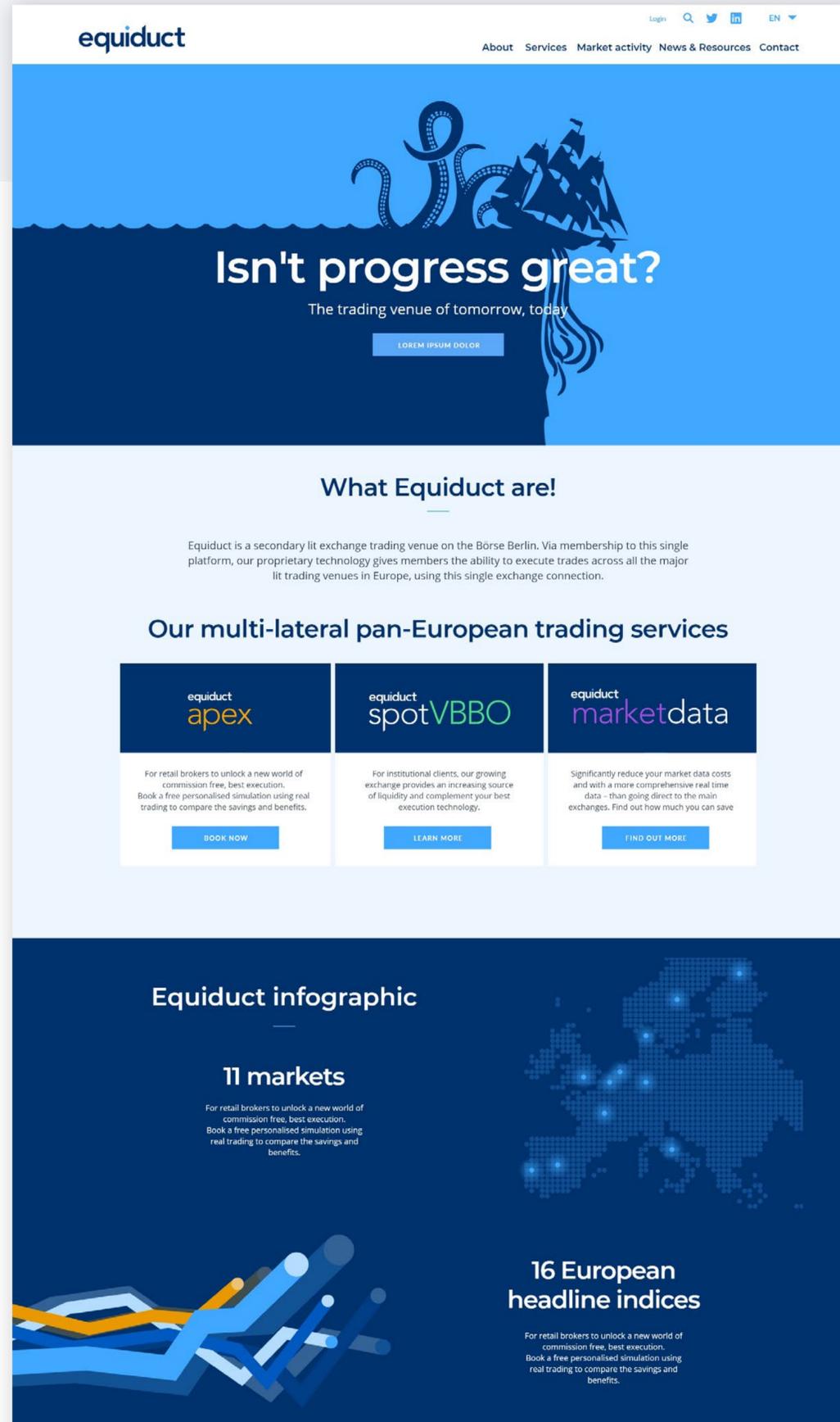
The campaign delivered a massive 8% uplift in new advisers using the software and a whopping 47% increase in fund recommendations which will increase revenues for many years from asset managers who pay to appear on the software.



# MARKETING ACTIVITY

## Equiduct

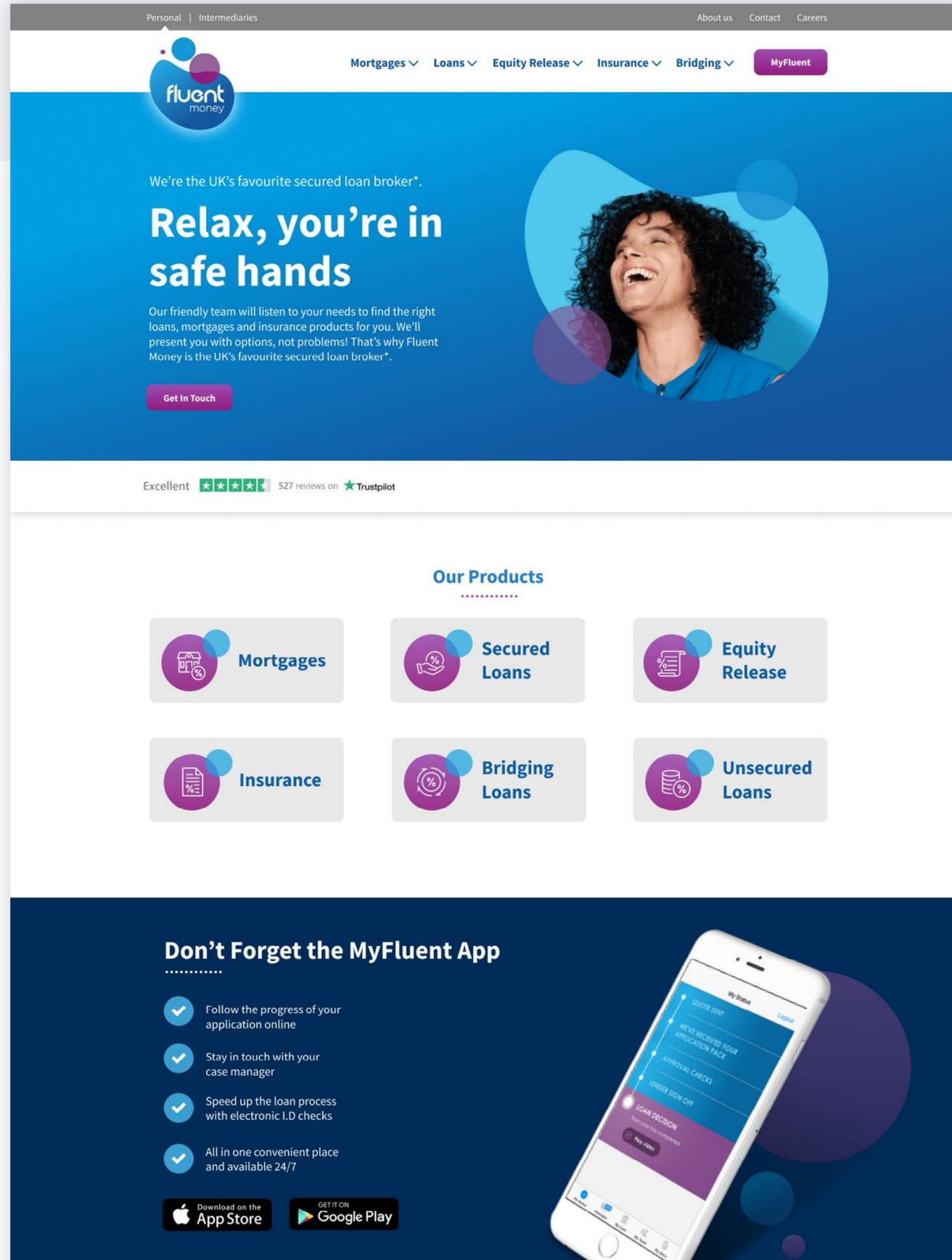
Equiduct's unique trading platform delivers pan European best execution for retail broker clients with zero fees. The truly innovative nature of their service wasn't reflected in their brand tone of voice or identity. Feeding off the passion and insight from our immersion sessions, we transformed their brand narrative and identity to reflect their client-centric and forward-thinking spirit with a brand essence of 'The trading venue of tomorrow, today' perfectly complemented by the campaign tagline and visuals 'Isn't progress great?' The huge transformation of the brand and new website has added renewed energy from inside and outside the business. Within a few months of launch has led to the engagement of five significant new clients and counting.



# MARKETING ACTIVITY

## Fluent Money Group

We're delivering a full brand refresh and group website for Fluent Money, launching in September. We consulted on the approach of bringing their multiple product led brands under one single brand identity to benefit from the halo effect of having one trusted and recognisable brand. Watch this space...



## INNOVATION & PRODUCT DEVELOPMENT

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

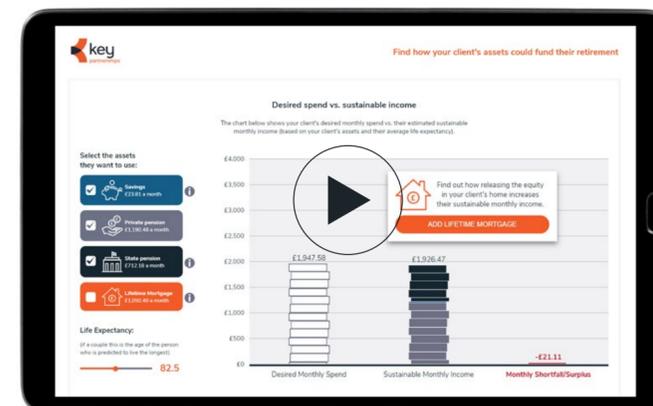
### Key Partnerships Retirement Funding tool

Working with Key Partnerships, we developed the retirement funding tool – an easy-to-use interactive tool that helps advisers have more personalised discussions with clients about their retirement finances. After entering some client details, the tool illustrates how all of their assets, including their home, can be used to help fund their retirement - based on their life expectancy and spending needs.

It allows clients to see their home as an asset – taking the first step to dispel myths around equity release and enabling advisers to help clients get more from their retirement. The tool has been key part of the sales journey that's helped generate additional borrowing of 11% equating to £7.8m in 2020 vs. the previous year.



### Watch tool video promo



TRY THE TOOL HERE

## LV= Risk Reality Calculator

A significant barrier to increasing protection take up is that advisers find difficulty in starting conversations around the risks their clients face – because most clients don't think it can happen to them. We helped LV= create the Risk Reality calculator – a three-step process (including a personalised report) that makes protection personal and real in a matter of seconds.

The calculator has 35,000+ calculations with an average of 3.07 minutes per session. It's been used in 175,000+ protection conversations, increased adviser conversion and protection take up – one of UK's leading adviser distributors saw a 53% increase in sales. Plus, it was voted 'Best Innovation of the Year' by advisers at Cover magazine industry awards.



TRY THE TOOL HERE

## PEOPLE AND TALENT

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

We believe our agency is an example of a new, improved way to approach FS marketing.

We believe our agency is an example of a new, improved way to approach FS marketing. Moreish is based on a network model: we collaborate with a range of partners to create work across all possible channels and media. This means we have access to a vast pool of talent, so we can always choose the right people for maximum creativity, flexibility and cost efficiency. We see this as an improvement on the traditional agency set-up, since it enables us to be media neutral and deliver totally integrated work that is 100% focused on the clients' needs, not just what resource is available, with more traditional agency models.

Most importantly, our ethos reflects our passion for financial services and our desire to move the industry forward. Marketing for FS too often revolves around incrementalism, making small changes in order to achieve a slight increase in the numbers. We want to move away from this trend, and instead use data, intuition and behavioural economics to develop game-changing ideas with big impact - winning 3 awards at the 2019 FSF marketing effectiveness awards with Benenden Health, and winning FSF Agency of the Year 2020.

Moreish is looking to set the standard for inspiring the next generation of Financial Services Marketing talent - like Simran Aniekar who is entered into this year's FSF Young Marketeer of the Year. On our blog we provide free resources to help FS talent learn to do marketing in a better way with free resources and tips.



2019 awards

ADVERTISING



BRAND STRATEGY



JUDGES' SPECIAL AWARD



INTEGRATED CAMPAIGN



FINANCIAL CAMPAIGN



moreish



WE BRING FAME AND FORTUNE TO BRANDS THAT HAVE A POSITIVE IMPACT ON FINANCIAL HEALTH

## THE FINANCIAL SERVICES INDUSTRY

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

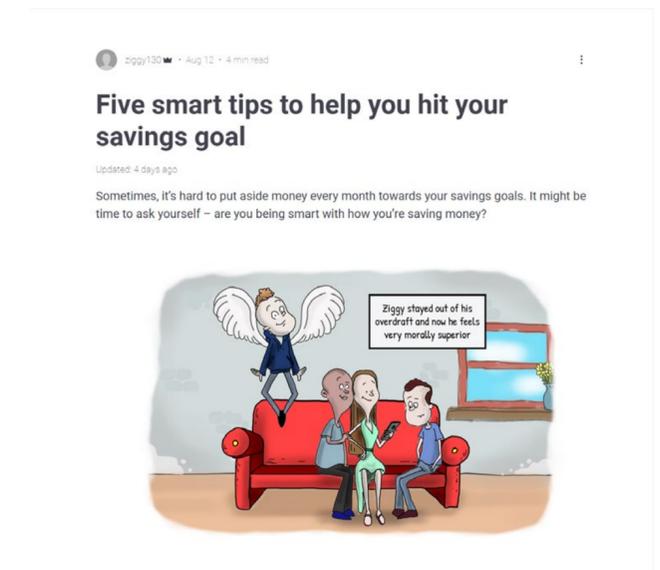
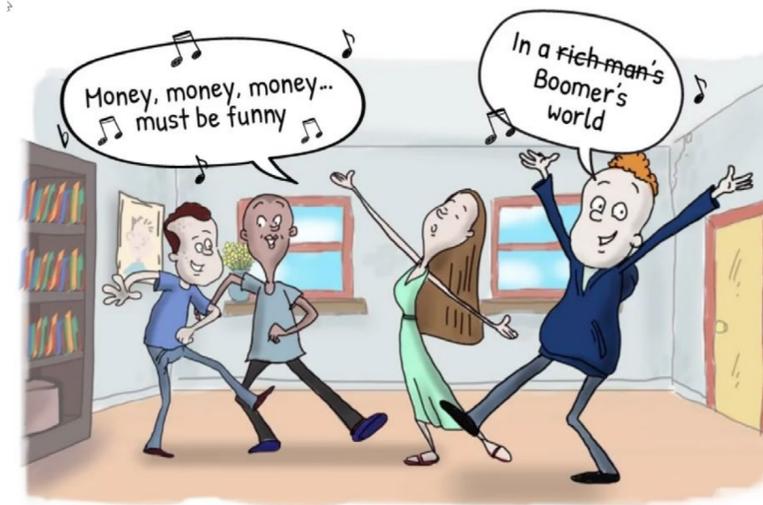
As one of the few purely FS-focused agencies, we have a unique understanding of industry landscape – and how we can make an impact upon it. We do this by helping clients across all channels to market, including financial providers, tech providers to FS firms, financial intermediaries and advisers, and consumers.

One of the ways we've made an impact this year is through our pro-bono work with the IPTF. Our goal was to create a platform that engages the younger generation (Gen Z and Millennials or Squigglers) on relevant financial topics that ultimately connects them with the concept of income protection – which remains relatively undersold with a lack of understanding on why it's needed and how to buy it.

Tapping into the meme-culture of the generation, we developed a character-led brand called Ziggy's Money Moves. Through Instagram (@ziggysmoneymoves) and a simple website blog (www.ziggysmoneymoves.com), we covered topics ranging from saving for a house deposit to building a financial security net.

And at the other end of the age spectrum, our work with more2life and Key Partnerships is positively impacting the conversations people are having around equity release, which has previously suffered from a difficult industry reputation.

Our goal is to help people at all life stages secure more financial freedom and security, it's what motivates us to challenge, innovate and create. And through the influence that we have on the work we produce, we've made a strong contribution to help make financial services a more inclusive and exciting place.



**ZIGGY'S**  
MONEY  
MOVES

VISIT THE WEBSITE

THANK YOU

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