



## **An Interview with Tim Shanahan, the "Brand Steward" of Compass Capital Corporation, "Your Trusted Financial Advisor"<sup>SM</sup>**

Founder and CEO of Compass, Tim Shanahan is responsible for the strategic and creative implementation of Compass's brand effort to date. He shares some of his views on the branding process and what it means to Compass.

### ***What is the biggest challenge facing Compass?***

Our biggest challenge is taking our history, which is rooted in a collaborative of individual financial advisors focused on separate proprietary advisory practices, and creating an integrated financial services company whose brand recognition is exactly what we are, "Your Trusted Financial Advisor." That means at any point of contact with Compass, you as our client can access a full range of financial services and feel "end-to-end" that you are dealing with "Your Trusted Financial Advisor." We want to move forward building a business with value while maintaining the people-oriented components of our corporate culture, which is a challenge when you are trying to move quickly and boldly into the future.

### ***Why do we need to build a Compass brand?***

The brand is a promise that gives a client confidence in knowing what the name Compass stands for. That understanding will dramatically increase the value of this company and the longevity of the organization. I believe that is fundamental to compete in the future. I believe that Compass adviser affiliates will be able to realize the value that comes from the transition of a "practice" into a "business" and that requires the "envelope" of a strong brand which is recognized by clients.

### ***What do you see the Compass brand standing for?***

Trusted, competent, local, responsive, personal, stable and secure in the long term. It's a balance between offering large company capabilities and personal, responsive, locally delivered advice and products/services.

### ***What single promise are we making to every Compass client or prospective client?***

A promise of trust and integrity that we are absolutely confident we can deliver.

### ***How does Compass deliver confidence?***

It starts with trust—that the client's interest comes first. It's basic and maybe old fashioned, but what could be more important? Next—integrity. We deliver what we say we will. Maybe even over deliver... if we pleasantly surprise our clients with "under promise/over deliver." Customers have to believe that we are smart enough to understand and anticipate what will happen to their money and that appropriate and reasonable risk controls are in place.

### ***What is the essential role of the message in the Compass brand?***

The brand message solves the question, "Compass who?" and changes it to an instantly recognizable "Compass: My Trusted Financial Advisor." The message persuades the reader that we are very confident and that you can count on us. It says we are trusted, competent, responsive, innovative and smart. What that really means is that it is incumbent upon every one of our employees and affiliates to step up to that promise and consistently deliver the desired result.

### ***What will clients experience as unique about working with Compass?***

Clients should feel the experience of being advised by a Trusted Financial Advisor. We uniquely deliver a balance between world-class organizations like Fidelity and SEI Trust, size and strength—and local responsiveness and personal attention. We are a well-sourced company with consultative roots, which filters through in our culture—we know how to listen and deliver quality solutions for our clients needs.