

Northern Trust: You can stack surveys and studies up to the ceiling if you want, but all that data is just gathering dust until you mine it for meaning. For Northern Trust, s2 drilled down to the core and came up with gold.

**Challenge**

Northern Trust asked s2 to help them turn the insights and statistical data located in their *Wealth in America* research study into something meaningful and actionable for their audiences.

**s2 Response**

We started by distilling the study's findings into compelling information points that would resonate with both their advisors and investors. We crafted both the overall positioning and the associated "Someday is Now" theme, as well as the high-level messaging.

We then developed the advisor and client brochures structured around the theme, creating practical tools that assisted advisors in having conversations that more fully reveal the unique set of hopes, dreams, and ambitions held by their clients. We focused on taking them through the entire retirement conversation—from initiation through the planning and implementation stages. This approach helped advisors realize that their role is to make sure that "when someday comes," their clients can afford to live it the way they always imagined it.

**Results**

The client's marketing team was impressed with the information packaging and the unique copy approach. Feedback from both the sales force and the advisors who use the tools was very positive, and the "Someday is Now" theme continues to resonate with Northern Trust clients.



client brochure



advisor brochure

