



Brand Guidelines

CONDENSED VERSION - JUNE 2026



How to Use This Brand Guide

Our brand is what clients, employees and others in the community all think, feel and respond to when they hear IPI Wealth Management mentioned. With every interaction and touchpoint we have a chance to build what our brand means to someone.

WHY BRAND STANDARDS ARE IMPORTANT

In the following pages you will find the requirements for appropriate usage of the IPI Wealth Management brand, logo, design elements and messaging in a variety of media. All client acquisition and retention materials, marketing content, publications, event collateral and electronic media should reflect the IPI Wealth Management brand. This guide serves as an aid for third parties, such as designers, agencies, printers, specialty companies and others, producing communications and marketing materials for IPI Wealth Management.



CONTENTS

4 / BRAND PLATFORM

11 / LOGO

21 / VISUAL IDENTITY

26 / APPLICATION CONCEPTS

The background of the slide features several abstract, overlapping geometric shapes in various shades of dark blue and navy. These shapes include rectangles, parallelograms, and trapezoids, some of which are tilted at angles, creating a modern, layered effect on the left side of the page.

1.0

Brand Platform

The foundational components that make up the framework
of the IPI Wealth Management brand.

Brand Purpose

This is where the brand finds its place in the world. It’s the value we add to someone’s life and what success looks like. An important piece of the brand strategy, this internal-facing statement speaks to what we do, who we do itfor and why we do it.

TO EMPOWER INDEPENDENT FINANCIAL PROFESSIONALS TO SUCCEED BY PROVIDING UNMATCHED SUPPORT, FLEXIBILITY, AND A COLLABORATIVE COMMUNITY ROOTED IN INTEGRITY AND INDEPENDENCE. AT IPI WEALTH MANAGEMENT, WE’RE COMMITTED TO FOSTERING RELATIONSHIPS THAT HELP OUR ADVISORS THRIVE AND MAKE A LASTING IMPACT ON THEIR CLIENTS’ LIVES.

Brand Purpose

The brand position is a single, ownable sentiment that is powerful enough to embody the essence of the brand. It is important to note that the brand position comes from a place of truth, serves as a reference from which all brand materials are developed and is big enough to be something that the whole brand can ladder up to.

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS

CONNECTED INDEPENDENCE

Brand Position

The brand position is a single, ownable sentiment that is powerful enough to embody the essence of the brand. It is important to note that the brand position comes from a place of truth, serves as a reference from which all brand materials are developed and is big enough to be something that the whole brand can ladder up to.

We stand at the intersection of connection. We connect advisors with a knowledgeable peer network, top-tier service, technology, compliance and operational support to give them and their clients the greatest chance of success. The ability to be connected to the IPI family and all of its support is what sets us apart.

CONNECTED INDEPENDENCE

Brand Position

The brand position is a single, ownable sentiment that is powerful enough to embody the essence of the brand. It is important to note that the brand position comes from a place of truth, serves as a reference from which all brand materials are developed and is big enough to be something that the whole brand can ladder up to.

We stand at the intersection of connection. We connect advisors with a knowledgeable peer network, top-tier service, technology, compliance and operational support to give them and their clients the greatest chance of success. The ability to be connected to the IPI family and all of its support is what sets us apart.

CONNECTED INDEPENDENCE

Independence signifies several key factors; advisors’ freedom to run their own businesses, the unshackling from tedious operational concerns, compliance support, no quotas to meet or products to sell, and the readily available resources that give advisors the time and space to to focus on what matters most to them and their clients.

Brand Story

The brand story is the first expression of the brand position in a long form piece of writing. The whole of the brand can be seen in the brand story, including what we offer to our audiences as well as the tone and personality of the brand voice.

The freedom to be independent. Yet the power of connection. It’s not a balance, but a necessity for the individual and the whole to thrive. At IPI Wealth Management, we stand at that intersection. Bringing advisors together and connecting them with holistic support, so that they can thrive on their own.

Advisors spend their hours caring for their clients, so we spend ours taking care of advisors. We champion those who believe in something bigger—those who build relationships, protect futures, and guide others with unwavering integrity.

We know our advisors. Find solutions for them. And ensure they’re getting the personalized service they need. We believe success multiplies when it’s shared and that leveraging a network of ideas, knowledge, and support is a competitive advantage. When it comes to compliance, advisors feel the safety of our first defense, ready to handle their needs with expertise. When it comes to leveraging technology to help advisors become faster, more efficient, and more meaningful - we deliver.

IPI Wealth Management is more than a partner, we are the steady hand that supports, the empathetic listener, and the guide that empowers. Creating that intersection where advisors have the freedom to thrive. All within a network that grows stronger with each addition.

1.3

Brand Values

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS

 Integrity

 Performance

 Innovation



2.0

Logo & Usage

To portray a sense of individual elements coming together to form an entity that is stronger when connected together, our logo is a representation of how our services embody CONNECTED INDEPENDENCE. There’s also an elegant nod to the star imagery of our logo from our rich history.

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS



Primary with qualifier (horizontal)

All print, online, marketing and collateral communications should clearly be identified as originating from IPI Wealth Management through the use of the logo, typography and color. Additionally, on brochures, postcards, direct mail, newsletters and other printed pieces, the IPI Wealth Management primary logo must appear on the front of the piece.

Logo Variations

When there is ample vertical space or if horizontal space is limited, the logo with the icon stacked on top of the wordmark can be implemented.



Vertical Logo



Horizontal Logo

2.2

Logo Icons

Icon-driven designs can be used on supporting materials to add visual interest and further convey our branded design.

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS



Logomark



Reduced logomark



Website Favicon
(16 pixels by 16 pixels)



Reduced logomark with URL

Logo Usage

The IPI Wealth Management logo retains its visual strength in a wide range of sizes. However, when the logo is reproduced in a size too small to read, its impact is diminished. The primary logo should be used at a minimum of .5 inches in print or 36 pixels for digital executions. The small use logo should be used at a minimum of .25 inches in print of 18 pixels for digital executions.

PRIMARY LOGO:

PRINT USAGE



DIGITAL USAGE



SMALL FORMAT:

PRINT USAGE



DIGITAL USAGE



FAVICON DIGITAL SIZE



BRAND PLATFORM
LOGO
VISUAL IDENTITY
APPLICATIONS



PROTECTED AREA/CLEAR SPACE

To maintain the legibility of the logo, a space equivalent to the logo’s icon should be maintained as clear space around the entire logo.



2.3

Logo Usage

The logo is a unique piece of artwork. The proportions and arrangement of the icon and wordmark have been specifically determined. The following examples show things you should NOT DO with the logo.

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS



Use dark logo on light background.
Use light logo on dark background.
Use appropriate color logo for situation.



Do not use light logo on light background.
Do not use dark logo on dark background.

2.3

Logo Usage

The logo is a unique piece of artwork. The proportions and arrangement of the icon and wordmark have been specifically determined. The following examples show things you should NOT DO with the logo.

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS



Co-Branded Options

Advisors within IPI Wealth Management should use a co-branded option on their materials.

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS



2.4

Co-Branded Options

Advisors that utilize their own logo for their firm, but are still within IPI Wealth Management should use a co-branded option on their materials.

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS





3.0

VISUAL IDENTITY

Visual Identity

People know us by our personality. But people recognize us through our visual identity – how our brand looks and feels.

Color Palette

Our brand colors represent our steadfast support and trustworthiness from shades of blue. Our warm, earthy tones reflect the hard-working people we serve.

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS

CLOUD BURST
#1E294A

RGB: 30, 41, 74
CMYK: 59, 45, 0, 71
PMS: 534 C
PMS: 280 U

CHAMBRAY
#334DA1

RGB: 51, 77, 161
CMYK: 68, 52, 0, 37
PMS: 7455 C
PMS: 2935 U

SAFFRON MANGO
#F0C660

RGB: 240, 198, 96
CMYK: 0, 17, 60, 6
PMS: 461 C
PMS: 461 U

DOVE GREY
#6D6E71

RGB: 109, 110, 113
CMYK: 4, 3, 0, 56
PMS: 423 C
PMS: 423 U

WHITE
#FFFFFF

RGB: 255, 255, 255
CMYK: 0, 0, 0, 0

HEX: #2A2D34
RGB: 42.45.52
CMYK: 76.68.57.59
PMS: BLACK 6 U

When using our brand typefaces it’s important to establish consistent usage across our communications. Fraunces is our primary font but should only be used for headers and callouts. Barlow in all uppercase is used for subheaders, while Work Sans sentence case is used exclusively for body copy.

BRAND PLATFORM
LOGO
VISUAL IDENTITY
APPLICATIONS

PRIMARY / TITLES	Fraunces abcdefghijklmnopqrstuvwxyz 1234567890	Fonts can be downloaded at the following links: Fraunces: https://fonts.google.com/specimen/Fraunces Barlow Medium: https://fonts.google.com/specimen/Barlow Work Sans: https://fonts.google.com/specimen/Work+Sans
SECONDARY / HEADLINES	BARLOW MEDIUM UPPERCASE ABCDEFGHIJKLMNOPQRSTUVWXYZ 1234567890	
BODY COPY	Work Sans Medium ABCDEFGHIJKLMNOPQRSTUVWXYZ 1234567890	

3.2

Photography

Photography should be a representation of CONNECTED INDEPENDENCE and our Messaging Pillars: Day-To-Day Freedom, Shared Values, and Pursuit of Excellence. These ideas come through by selecting photos that show people working together in professional settings and in environments that feel organic and grounded in the reality of our advisors.

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS



Core Brand Elements

The core brand elements are pulled from our logo itself. The angles we use in design reflect the angles of the lines within our logo. There are many ways we can use this device - for images, to organize information, and even create original design elements.

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS



Double Diagonal Line



Trapezoid



Diagonal Line



Rhomboid



4.0

VISUAL IDENTITY

Application Concepts

4.1

Prospecting
Brochure

In this example brochure designed for prospective advisors, we tell the story of what IPI Wealth Management could offer to them. It's a mix of brand-building and concrete facts. We start with the main idea, freedom of independence, and then continue with copy that supports how we help support their business through real, tangible services.

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS



4.2

Overview One Sheet

In a concise one sheet, this is targeted to advisors and shares the benefits of joining IPI Wealth Management.

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS



4.3

Advisor
Toolkit

While IPI Wealth Management’s brand is targeted toward advisors, advisors also need materials to give to their clients. This brochure is targeting that end-user and is an example of how IPI Wealth Management can help their business with marketing and collateral for their clients as well.

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS



4.4

Stationery

Stationery templates are part of the materials IPI Wealth Management would provide in the Advisor Toolkit.

BRAND PLATFORM

LOGO

VISUAL IDENTITY

APPLICATIONS



We are proud to have such a strong and respected brand. Thank you for making it even stronger.

If you have any questions about this guide, please contact Julie Applegate, Director of Marketing, Communications and Events at japplegate@myipiwealth.com
217-425-6340

