



**BRAND:** Cedar Capital  
**TITLE:** We Are Cedar  
**FORMAT:** Corporate Video

**CEDARCAPITAL**

### CREATIVE DIRECTION:

The concept is to define Cedar Capital with 4 powerful adjectives. These four adjectives would help divide this main branding piece into six sections. (1) The intro would be delivered from Paul, and establish 5 different interview settings against windows in the office with the Chicago skyline in the background. Paul would mention the first word “flexible”, and a transitional piece would help lead the viewer to (2) Jon Poyer, who would discuss the flexible nature of Cedar Capital. Jon would mention “dynamic” which will lead to (3) Yash. Yash will mention “comprehensive” which will lead to (4) Michael, and Michael will mention “integrity” which will lead to (5) Mac. Macs will start the (6) end sequence by completing her thought with “We are built on integrity”. The remaining partners would add their key word, and we would transition to the logo. Although this main branding piece is “scripted”, I would suggest having each on-camera person describing how the word applies in his or her own voice. The consolidated script (below) is a suggestion as to how I’d like to see the words defined.

### CONSOLIDATED SCRIPT:

*(Paul)* I’ve told colleagues that **Cedar Capital** is a solutions company. When they ask what exactly does that mean, I smile. Because we don’t want to be put in a box with a classification that weighs us down. We provide innovative investment solutions. We’re not trying to be vague, we’re trying to be flexible.

*(Jonathan)* Being **flexible** is key. We work in an industry that has constant change, and if you want to be successful... You have to be prepared you have to be ready to adapt. Can other shops make changes quickly? Are they able or even willing to recognize that changes need to be made? I know one thing is for certain, Cedar Capital is. Our business model is built around that adaptability, and is why we can offer such a dynamic set of options to financial advisors.

*(Yash)* The advantage to being a boutique firm is that we can be **dynamic**. The individual funds and portfolio managers we represent are strong on their own, but when you have the opportunity to add a fund and help balance out a portfolio even further, that is when a firm can be dynamic. There is a harmony not unlike music that takes place when two unique pieces come together. It’s an exciting time for Cedar Capital because we have plans for continued growth, to give financial advisors comprehensive choices. To use the music analogy, Cedar can be a dynamic symphony of independent qualified funds.

*(Michael)* Cedar Capital is in the unique position to be able to offer a wide variety of financial solutions. Our goal is to not only be **comprehensive** in our offerings, but disciplined in choosing the firms we represent. We have to be responsive to the needs of our clients and provide heavily researched alternatives. Complacency is our enemy, the status quo just doesn’t cut it anymore. We need to be dynamic in our approach, and continue to put together a team of strong individuals. Individuals who lead with integrity.

*(Mac)* We will not be a fund in our offerings that doesn’t meet the high standards and result driven philosophy that this organization was founded on. At the foundation of Cedar Capital is our integrity. A symbol of our **integrity** and dedication will be on every fact sheet and piece of literature we distribute. The BY CEDAR logo will be our stamp of approval, so financial advisors and end users alike will know that the experienced team of innovative leaders at Cedar Capital proudly endorse that financial property.

We Are built on **integrity**  
We Are **Comprehensive**  
We Are **Dynamic**  
We Are **Flexible**  
We Are **Cedar Capital**