

# Welcome to Marketing Center

Marketing Center helps you tackle the challenges of organic growth, succession planning, productivity and compliance by providing the marketing resources needed to manage your business, including practice management strategies, marketing materials for investors and advisors, investor collateral, customization and co-branding tools along with a full suite of product solutions. Marketing Center's library contains hundreds of marketing pieces you can browse, download, customize and order.

## CONTENT AND NAVIGATION

- **Working with Pershing:** Explain Pershing's role in supporting your firm, as custodian of your clients' assets, and understand the complete value of your relationship with Pershing:
- **Pershing Behind the Scenes:** Materials you can share with clients about Pershing, our latest facts and figures and how we support your firm.
- **Corporate Social Responsibility:** See how we are committed to supporting causes that advance our profession, including economic empowerment and financial literacy.
- **Pershing Webcast Series:** Interactive workshops around topics affecting your business, such as compliance, technology and practice management.
- **Pershing Events Calendar:** Information and access to Pershing's world-class events and supporting content.

The screenshot shows the Marketing Center website interface. At the top, there is a search bar and navigation tabs for 'All Marketing Materials', 'Investor Facing', 'FINRA Reviewed', 'HNW Resources', and 'Forms'. The main content area is titled 'Resources for Driving Growth' and features several key sections: 'Working With Pershing', 'Pershing Behind the Scenes', 'Corporate Social Responsibility', 'Pershing Webcast Series', and 'Pershing Events Calendar'. A 'Get In Touch' button is also visible. The bottom of the page shows a pagination bar indicating 'Displaying 1-4 of 4' items.

This screenshot displays a grid of resource cards under the heading 'Resources for Driving Growth'. The cards include: 'Working With Pershing' (explaining Pershing's role), 'Grow Your Business' (advisor programs and practice management), 'Build Marketing Strategies' (tools for customization), 'Customize Your Content' (personalization tools), 'Perspectives' (commentary on business insights), 'Explore Solutions' (financial solutions for clients), 'Stay Compliant' (regulatory environments), and 'Tax Reporting' (latest tax and regulatory information). Each card has a 'GET STARTED' or 'LEARN MORE' link.

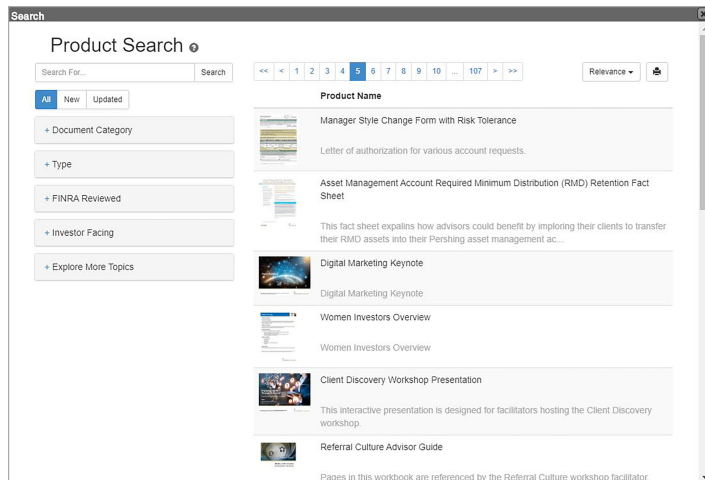
- **Grow Your Business:** Advisor programs, marketing and practice management resources to help you manage and grow your business.
- **Build Marketing Strategies:** Customized campaigns featuring an array of tools and content that can easily be executed in your own marketing and communication strategies.
- **High-Net-Worth Resources (HNW):** Valuable tools to support you throughout each phase of a HNW client's wealth journey.
- **Retirement Resources:** One-stop site for resources to help you with IRAs, rollovers and employer-sponsored plan business, including productivity enhancements.
- **Marketing Strategies:** Step-by-step guidance, including dynamic tools and diagnostics, to support marketing strategies geared towards your clients.
- **Customize Your Content:** Take advantage of Pershing's customization tools and practices to apply branding and personalization to your print and digital materials.
- **Customization Library:** Extend your brand by using our online customization templates in our library of investor-facing marketing materials.

- **Co-Brand Pershing Materials:** Familiarize yourself with Pershing's co-branding processes, including how to use Pershing's name, logo, or content in your materials and requesting native Pershing files for co-branding purposes.
- **Pershing Logos:** Current Pershing logos available for download in multiple formats.
- **Referencing Pershing:** Learn how to appropriately reference your relationship with Pershing in your materials with sample language and directions for approval.
- **Perspectives:** Commentary and actionable insights that can help manage advisors' business more efficiently and serve your clients more effectively.
- **Explore Solutions:** An overview of Pershing's solutions ranging from annuities and lending, to philanthropic and retirement solutions.

## ADDITIONAL FEATURES & FUNCTIONS

- **Online Ordering:** Many of our materials are available to order at no extra charge to your firm. Easily place your order by using the **Add to Cart** button on specific printable pieces.
- **Favorites:** Tag frequently used materials as Favorites for easy access.
- **Marketing Center Support:** Located at the top right of the Marketing Center homepage, Marketing Center Support offers extensive information on navigation, features and materials in Marketing Center. For additional questions, please email [marketing@pershing.com](mailto:marketing@pershing.com) and we will be happy to assist you.

- **Search:** Our Advanced Search allows you to find materials from any page on the site and filter results:
  - Search by keyword
  - View only new or updated materials
  - Sort results by relevance or alphabetical order
  - Narrow results by specific topics
  - Filter by document type
  - View FINRA-reviewed and investor-facing materials
  - Filter by customizable, downloadable and orderable materials



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