

Why Wealthwide?

A closer look behind the scenes of our rebrand.



Where it all began

We started this journey with an open mind and a shared vision – to rebrand Essential Money so we can stand out and be recognised for who we really are and what we really do for our clients.

We worked with StudioLR – the gutsy creative agency – to develop the brand, and our whole team found the process really rewarding. This document gives you a little peek behind the scenes of that process, we hope you enjoy it.

Thomas and the whole Wealthwide Team,

Thomas Dickson



Step 1. Research & Listening

The first stage of our rebrand was all about understanding who we are and when we're at our best. How do our clients see us? What do they value most about us? And what makes us stand out from the competition?

Research Approach

- **Team workshops** where we all shared our hopes and fears for the rebrand, and our ideas for what makes the company special
- **1-2-1 client interviews** where clients shared what made us different and what they get out of working with us. We also reviewed a huge bank of testimonials and reviews we'd gathered over the years and pulled out the consistent themes
- **Audience data audit** looking at all available data to help us be visible, useful and appealing to other dentists who don't currently work with us
- **Complete brand audit** reviewing all our communications to date, from internal values and business plans to magazine articles and our website
- **Competitor audit** to reveal opportunities for us to learn and opportunities for us to stand out

Findings – what differentiates us?

- **We help people see their full financial picture,** and our clients comment on it again and again... 'they revealed my whole situation', 'showed me how it all fits together', 'the overall picture helps us makes decisions', 'it's very liberating'
- **We have a broad-reaching, thoughtful approach and get to know everything about our clients,** encouraging them to think deeply too. Our advice takes account of their whole situation – including their hopes, dreams and fears
- **Our dental specialism means we can see the patterns and interdependent parts of the wider whole...** you can only fully understand the big picture once you understand every part. This was especially valuable as dentists have so little free time.
- **Through future modelling we can show our clients a very wide view of their financial situation and how it may change** – every potential scenario is planned for
- **We have a very transparent approach** – we show our clients things that others don't, with clear upfront fees and clear, honest, Plain English communication
- **We are independent, unrestricted advisers so we can show our clients the whole market,** all products and all options – finding what's right for them, rather than what's right for us

Strategic positioning

From our research findings, we concluded that the thing that makes us stand out is our ability to **help dentists see their full financial picture**. We were also able to pin down our tone of voice – this is the personality that shines out of our team.

Our Single, Sharp Idea

We help dentists see the full picture so they can get more out of life. We do this by helping them look wider – seeing the full extent of their finances, their dreams, their options, and how they all fit together – so they can make decisions with confidence and peace of mind.

Our Personality

Friendly

Financial planning is a very personal service. And for a lot of people it's an intimidating one too. But we can only do our best work if people open up to us. That means everything we do has to be warm and approachable – making people feel at ease.

Thought-provoking

The depth and breadth of our process helps clients see things in perspective. They can glimpse their potential future, and change their present. That perspective is very valuable – the more we can share it, the more valuable we are. We should always aim to make our readers and viewers stop and think.

Mature

We're an established business. We've learnt through experience and we know there are no shortcuts to success. Our experience has given us a natural, understated confidence – we don't need to be showy, boastful or flippant to get attention. We're comfortable being honest, helpful and doing things the right way.

Upbeat

Yesterday doesn't matter in our line of work. We're a future-focused business, helping people live the lives they want. It's an exciting place to be – and one fuelled by optimism and momentum. Our clients should feel good about their future. And we should feel good about ours too. We fill our comms with energy and positivity and never get cynical, negative or bogged down in the past.

Naming

Names are very subjective and renaming a business gives most people the fear (Including us!). But 'likeable' is really just one of the seven criteria for a good brand name. We made it less subjective and more objective by judging our options against all seven...

What makes a good name?

1. Distinctive

Can it stand out? Is it a word that you haven't heard before, that separates well from everyday speech.

2. Brief

Is it short enough to remember and say? Names longer than 3 or 4 syllables always get abbreviated by others (whether you like it or not!).

3. Appropriate

Does it suit the service we provide? And does it fit our strategy?

4. Easy

Is it easy to spell and to say out loud? Could you write it down correctly if you heard someone say it?

5. Likeable

Will people like saying it? Does it have an idea that sparks something nice? Or is it nice to say – maybe with some alliteration or nice rhythm?

6. Extendable

Does it have legs? Does it suggest an idea that can work across lots of different things – from visuals to presentations to events ideas.

7. Protectable

Can we get a good domain name – ideally a .co.uk with no extra words? Can we trademark it?

The Name: Wealthwide

The naming process started with a huge list of interesting words and themes that fitted our strategic positioning. From this list, over 200 names were generated. They were gradually honed, checked, built on, and checked again, until we had a shortlist of 10.

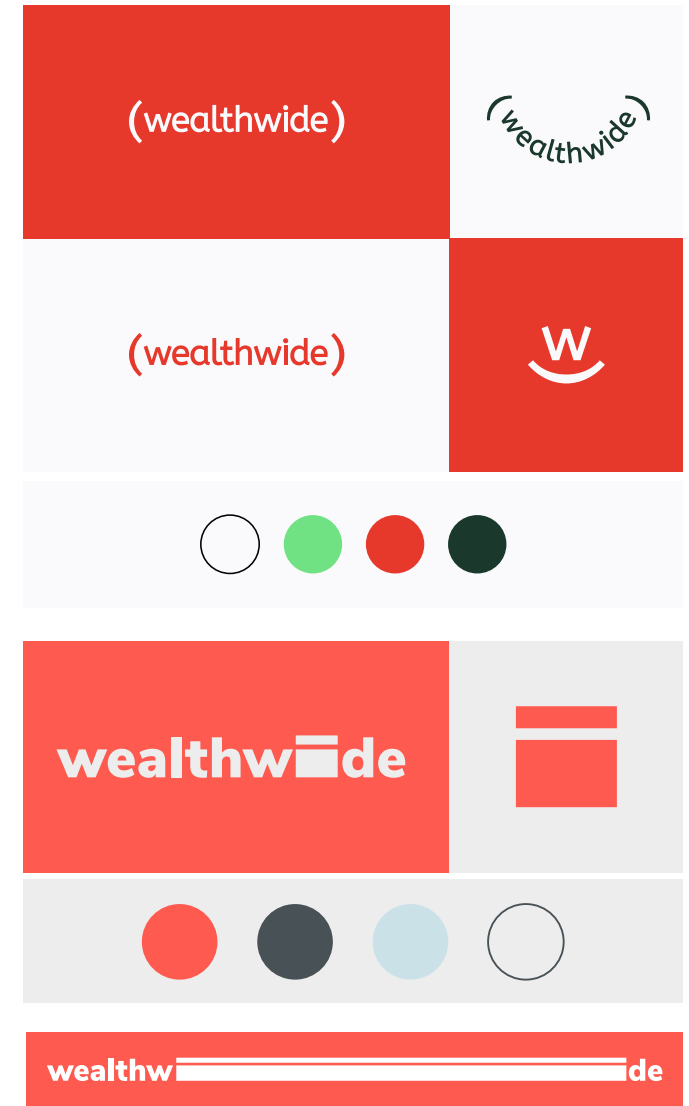
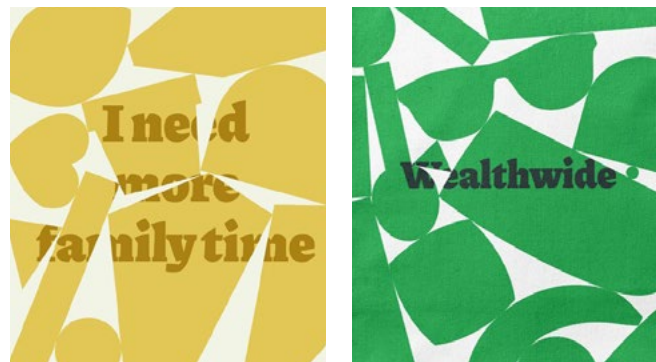
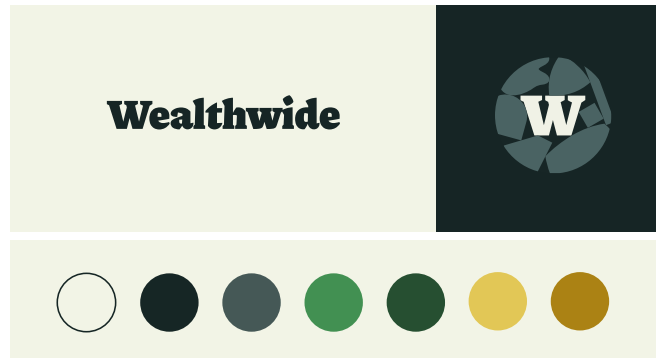
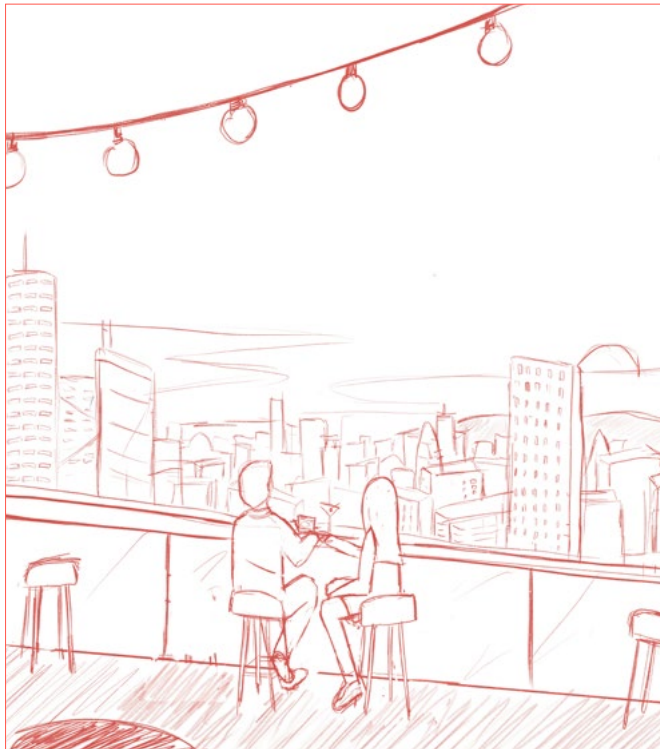
From this list we found a clear winner: Wealthwide.

It summed up our whole 'full picture' approach perfectly. So we did our legal checks, registered the trademark, and bought the domain name www.wealthwide.co.uk

Creative exploration

With the name agreed, we explored different ways to bring it to life creatively – from choosing colours to designing logos and writing headlines.

We really wanted to dramatise the quality of life our clients can enjoy so we commissioned a set of illustrations by a talented illustrator called Annie Wright.
From here, it was just a case of bringing it all together...



wealthwide
Life Unboxed

Take a wider view of your finances

We help dentists see the full picture so they can get more out of life. We do this by helping them look wider – seeing the full extent of their finances, their dreams, their options, and how they all fit together – so they can make decisions with confidence and peace of mind.





wealthwide
Life Unboxed

Swap long hours for long weekends

At Wealthwide we help dentists see their full financial picture so they can get more out of life. Look wider at [wealthwide.co.uk](https://www.wealthwide.co.uk)



wealthwide
Life Unboxed

From blue gloves to green fingers

Our bespoke financial planning service helps dentists see their full financial picture so they can get more out of life. With a dynamic plan in place, you can make decisions with confidence and peace of mind.



Less overtime more family time

Life changing, liberating and reassuring are just some of the ways our clients describe our financial planning service. It gives us a huge buzz to know that our service takes the pressure off our clients and frees them up to focus on the bigger picture life has to offer.



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Thanks for reading

Feel free to get in touch any time:

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