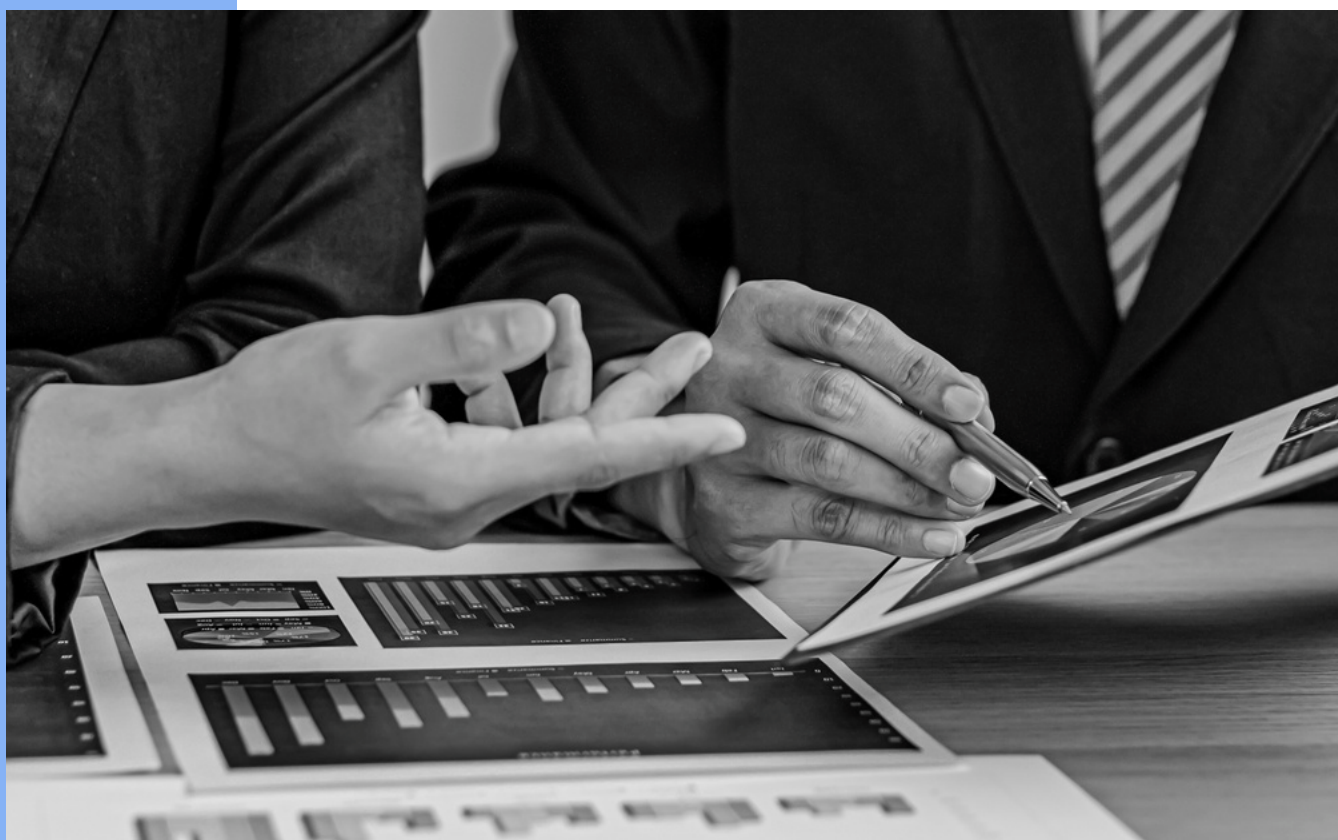


Selling to the largest Money Management Industry

2025

Financial Guide



INTRO



SELLING TO THE LARGEST MONEY MANAGEMENT INDUSTRY

Banks, credit unions, and financial advisors have always used promotional products to make one-on-one connections with potential customers and clients in their communities. Branded promotional items make cost-effective gifts for future account holders during bank field trips and financial literacy fairs held in coordination with local school districts. Promotional product giveaways at community events are also standard practice in financial services marketing. Building strategic community partnerships with schools and other local organizations, sponsoring local sports teams, planning financial wellness programs, making charitable donations, and handing out free swag at community events like festivals and fairs are tried-and-true strategies for building the type of positive PR that is increasingly important for financial services companies in the age of digital banking.

BANKS - CENTRAL, RETAIL, COMMERCIAL, INTERNET, CREDIT UNIONS

Because of the scale of business and the way these banks operate, they spend a lot of time and resources to have representation at community events. This includes things like bicentennial celebrations, charity events, festivals, etc. Community banks like to have a home-town feel and one-on-one relationships with their customers. Representatives from the bank can pass out promotional products during the festivities, or include them in the swag bag if one is handed out.



1518PBR

15" X 18" Poly Blend
Rally Towel



ODIN

20 Oz Odin Vacuum
Insulated Tumbler



ESSENTIALS KIT

Essential Kit

INSURANCE COMPANIES

Financial institutions that help individuals transfer the risk of loss are known as insurance companies. Individuals and businesses use insurance companies to protect against financial loss due to death, disability, accidents, property damage, and other misfortunes.

If you're wondering how to sell to insurance companies, it begins with defining your audience. Then you want to think about the best ways to reach them. Think about common mediums they might use to read or hear your message. In the world of influencer marketing, social media campaigns, and other tech-driven promotional ideas, it's easy to overlook more traditional marketing activities that continue to prove effective. One long standing tactic is the distribution of marketing gifts. Promotional products for insurance agents range from simple to elaborate, but they all have one thing in common: They are designed to provide real value to clients and to remind them of the importance of your mutual business relationship.



EKCOLOR

25 Oz Ek
Color Water
Bottle



CBO

Carabiner
Bottle
Opener



DOT

Dot Full
Color Felt
Coaster

SAVINGS AND LOAN ASSOCIATIONS

There are countless reasons one might seek out a loan, the most common being college tuition, financing a business, or purchasing a home or car. Credit unions, loan officers, and other lending institutions can target their advertising to fit the needs of their customers—teenagers applying to school or buying their first car, millennials financing their first home or business, etc. Oftentimes, lenders will take a commission on any loan they approve, so they will be motivated to provide promotional products that will attract new clients.



IWRITE-GIFT

Iwrite-Gift Stylus Pen
W/ Chrome Accents & Box



PREMIUM

Premium Silver Stylus
Pen W/ Metallic Accents



1011

11 Oz Full Color
Stoneware Executive Mug

MORTGAGE COMPANIES



Financial institutions that specialize in originating or funding mortgage loans are mortgage companies. While most mortgage companies serve the individual consumer market, some specialize in lending options for commercial real estate only.

Mortgage companies focus exclusively on originating loans and seek funding from financial institutions that provide the capital for the mortgages. Many mortgage companies today operate online or have limited branch locations, which allows for lower mortgage costs and fees.

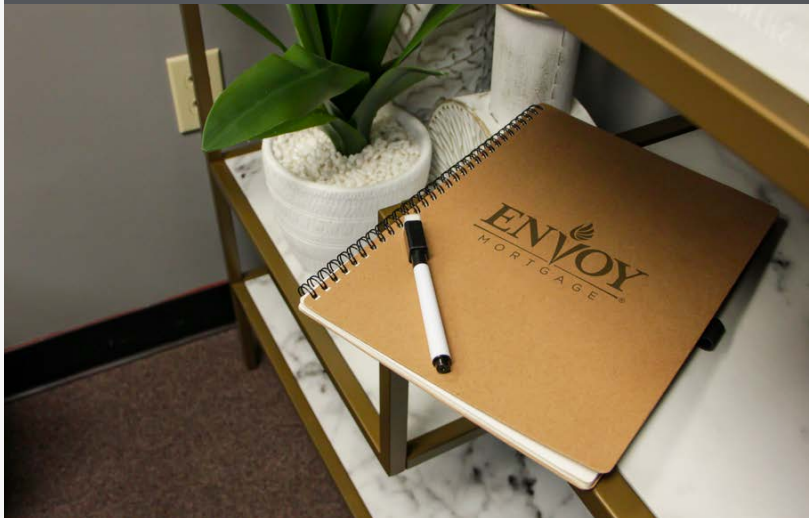
MORTGAGE COMPANIES

Pens are tried and true practical giveaway items, but there are other options for mortgage companies, such as hand sanitizer, bags, mouse pads, or keychains.

CASE STUDY

A Home loan mortgage company needed something to explain the difference between different loan options to potential customers. It was struggling to find a way to print materials for each type of option relevant to the customer's needs and financial background without creating a multitude of paper forms to fill out and keep up with in order to explain.

The mortgage company gave each of their representatives a WBNOTEBOOK. With 8 pages of blank whiteboard the agent could literally walk through each option with the customer as it was relevant to their individual financial situation. This helped the customer understand how the potential loan options would work while also having the piece of mind that none of their sensitive information was being stored or used for anything else.



1032

8"X9-
1/2"X1/4"
Soft Mouse
Pad



SFK

Sure-Float
Key Chain

BROKERAGE FIRMS



Competition is fierce among financial planners, investment firms and banks. When it comes to choosing a partner for their money, many people look beyond which institution offers the best interest rates and/or investment returns and look for financial partners that share the same social and environmental values.

IN THE PAST, PEOPLE HAVE CHOSEN CREDIT UNIONS, COMMUNITY BANKS AND LOCAL FINANCIAL PLANNERS OVER THE WORLD'S BIGGEST INSTITUTIONS. NOW, THERE ARE EVEN MORE ALTERNATIVE CHOICES FROM IMPACT-DRIVEN BANKS TO CERTIFIED B-CORPS.

SUGGESTED PRODUCTS



PG-2

Piglet Bank



PEBBLE

3-1/2" X 5" Stone Paper Jotter

Purpose-driven banks and local financial planners want to identify with their local community and customer base. One way to do this is to make sure promotional products speak to your organization's sustainable mission. Whether you want a giveaway to send home with potential customers or you are exhibiting at a tradeshow or a community event, there are many eco-friendly promotional products with a financial theme.



CORK

100% Eco Cork Barrel Pen



ECT

Eco Carry Tote

CREDIT CARD COMPANIES



Evolving consumer preferences have changed the credit card marketing game for banks and credit unions. Younger consumers are decidedly more debt-averse, and more likely to prefer debit over credit cards. But that doesn't mean that Millennials and Gen Z don't use credit cards. Banks and credit unions just have to understand how to better position their credit card offerings, and to offer rewards that resonate the most.

Consumer payment preferences for credit cards are engrained, especially with older consumers. And it's possible for banks and credit unions to ingrain a preference for credit cards in younger consumers, and those consumers who avoid credit cards as well. The question is how to design and market credit cards to meet consumers' changing needs and desires and become top of wallet.

CREDIT CARD COMPANIES

SW

Smart Phone Wallet



EEVMW-FDP

Easy View Magnetic Wallet



ECSMB

Eco Carry Standard Market Bag



BEDROCK

Business Card Stone Paper Notebook



Providing a phone card wallet, tote bag, or physical wallet with sign up would boost sign up rates. Customers like feeling valued, so included a swag back of items with sign up would secure loyalty to each credit card company.

