

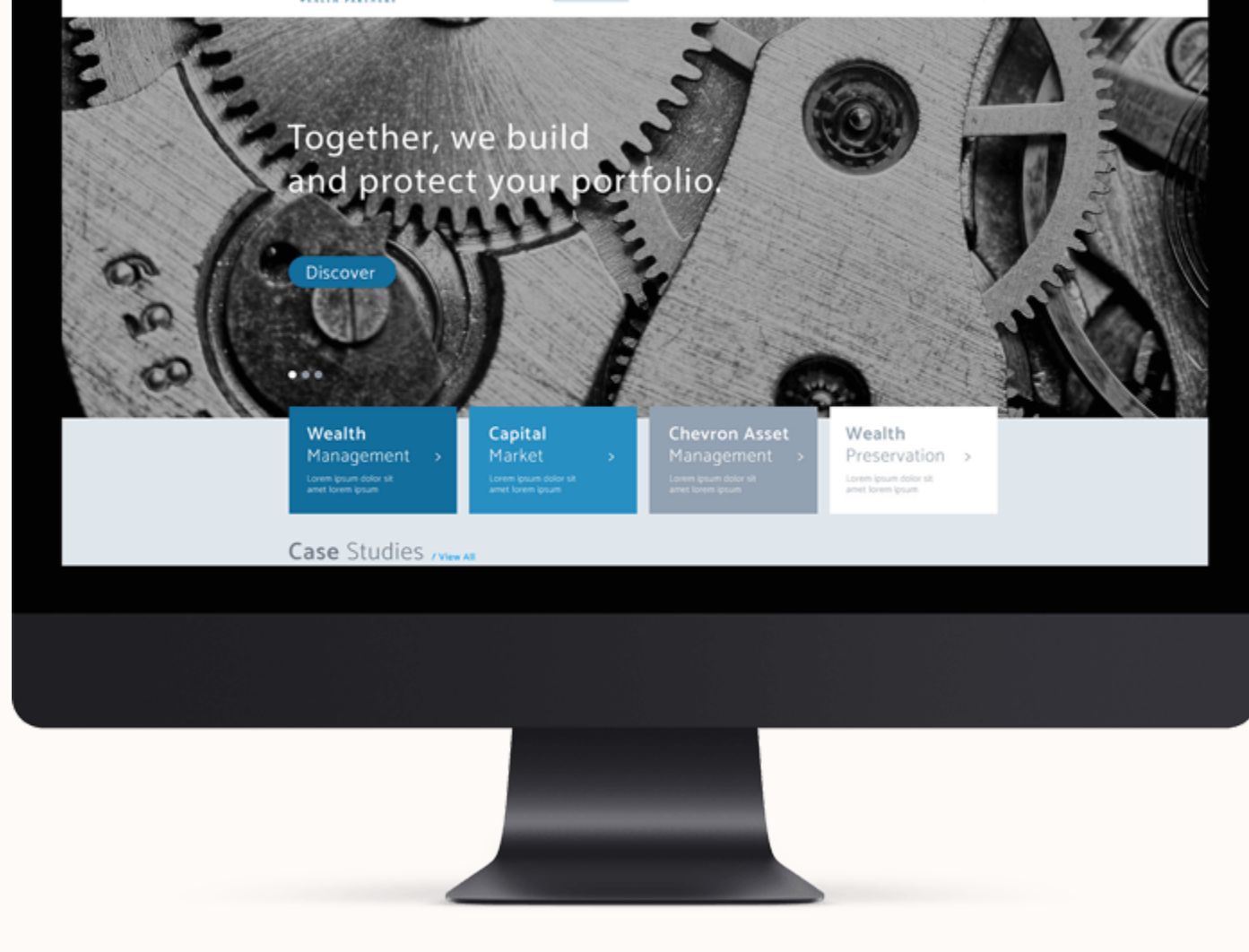
# WEALTH MANAGEMENT WEBSITE

ECHELON WEALTH PARTNERS

BRANDING  
WEBSITE  
RESEARCH  
CONTENT  
SEO  
CREATIVE

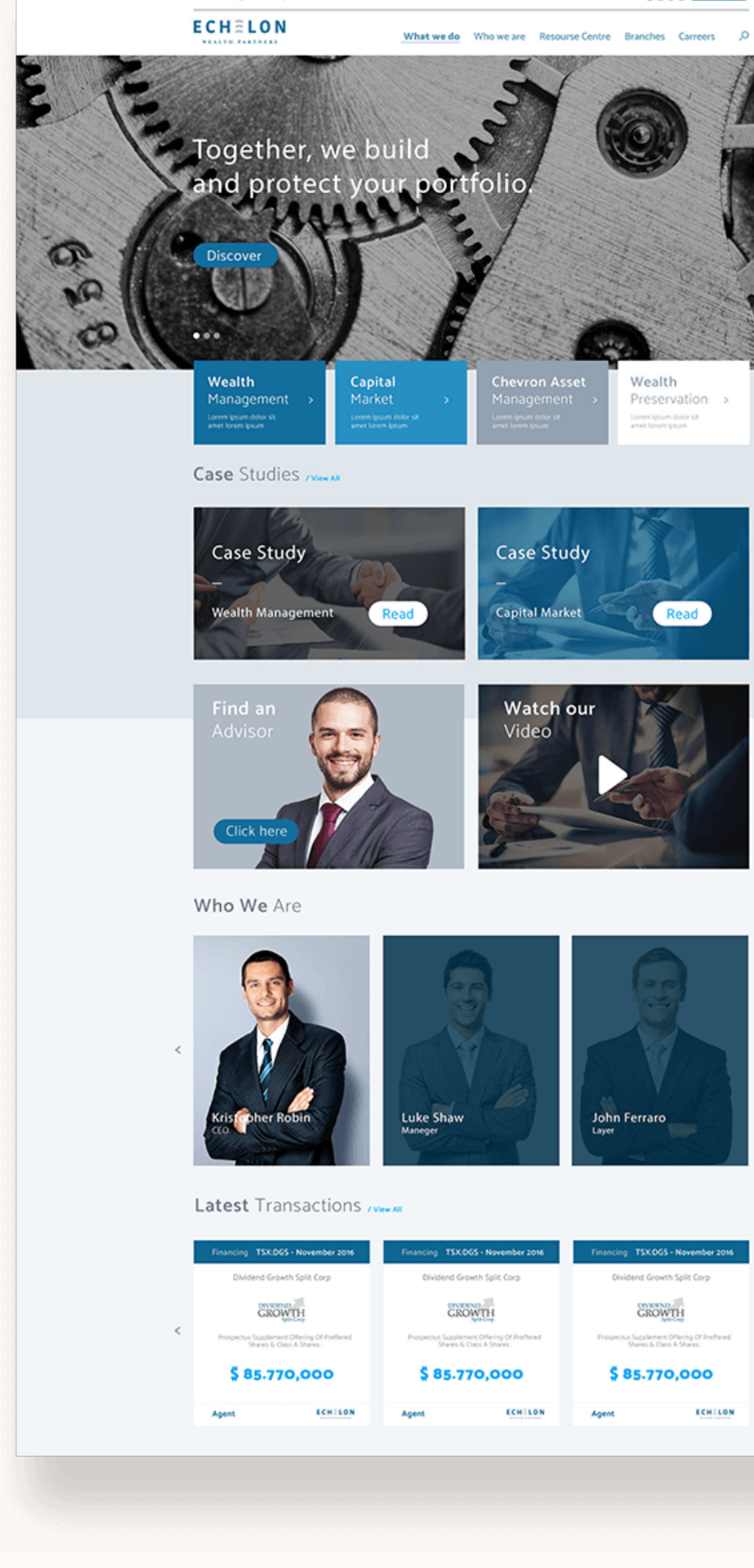
Echelon is a leading Canadian wealth management and capital markets firm providing investment services worldwide. With \$4 billion in assets under administration and management, Echelon has more than 100 investment advisors and portfolio managers servicing clients from their offices in Toronto, Oakville, Ottawa, Montréal, Calgary, Vancouver, Victoria, Saskatoon, London and Edmonton.

**ECHELON**  
WEALTH PARTNERS



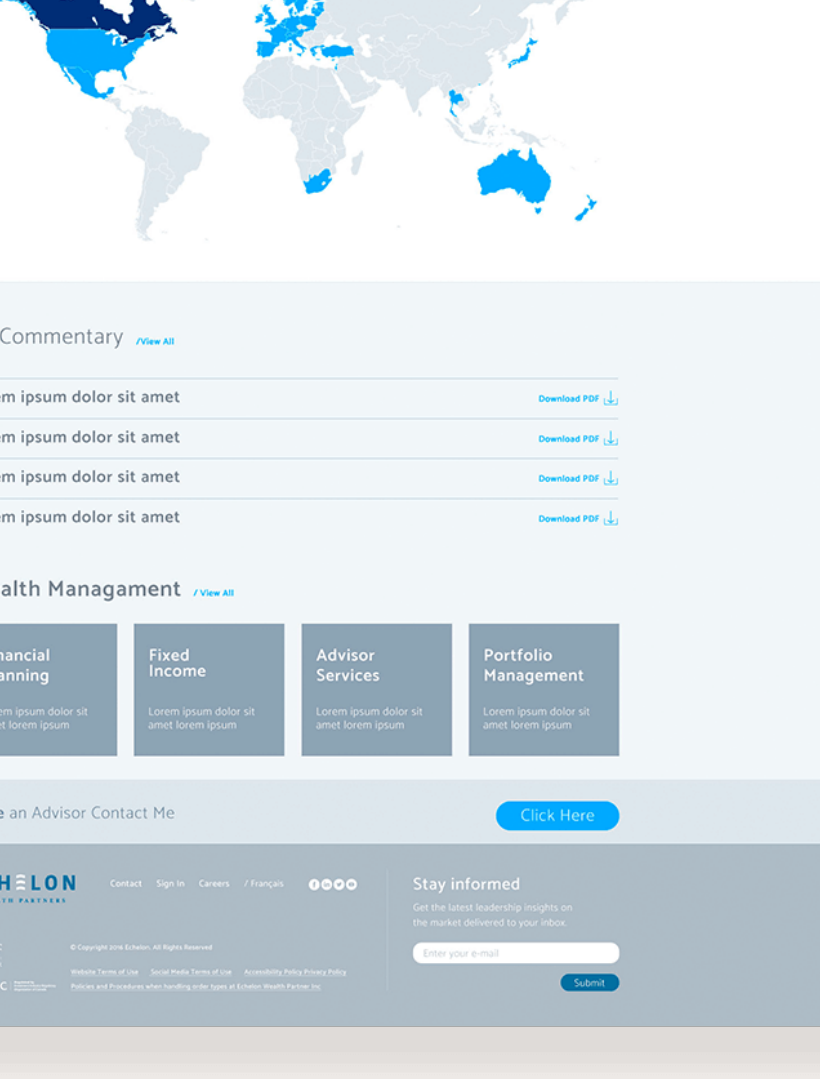
## Challenge

Echelon first opened their doors in 2010 and has been growing consistently since. With the acquisition of Dundee Goodman Private Wealth in 2016, they tripled in size, broadening their service offerings and geographic reach. As a result, Echelon faced inconsistent internal and external communications. Their offer was not being communicated clearly across their platforms; although their products and services were top-tier, they noticed that their clientele was struggling to understand what exactly they provided. The existing Echelon website was difficult for users to navigate and non-responsive, it had no SEO and lacked accurate and concise copy, and a Call To Action. Echelon's subsidiary, Chevron Wealth Preservation, as well as their individual advisor websites, faced identical issues.



## Solution

After analyzing the existing Echelon websites and based on their requirements and branding guidelines, FLD custom developed two responsive corporate websites designed with the company's primary target markets in mind; one for Echelon's main corporate website and its subsidiary. We also developed a website with the same capabilities for Echelon's Montréal advisor team which was designed based on information gathered from internal surveys developed and distributed by FLD to all the Echelon advisor offices.

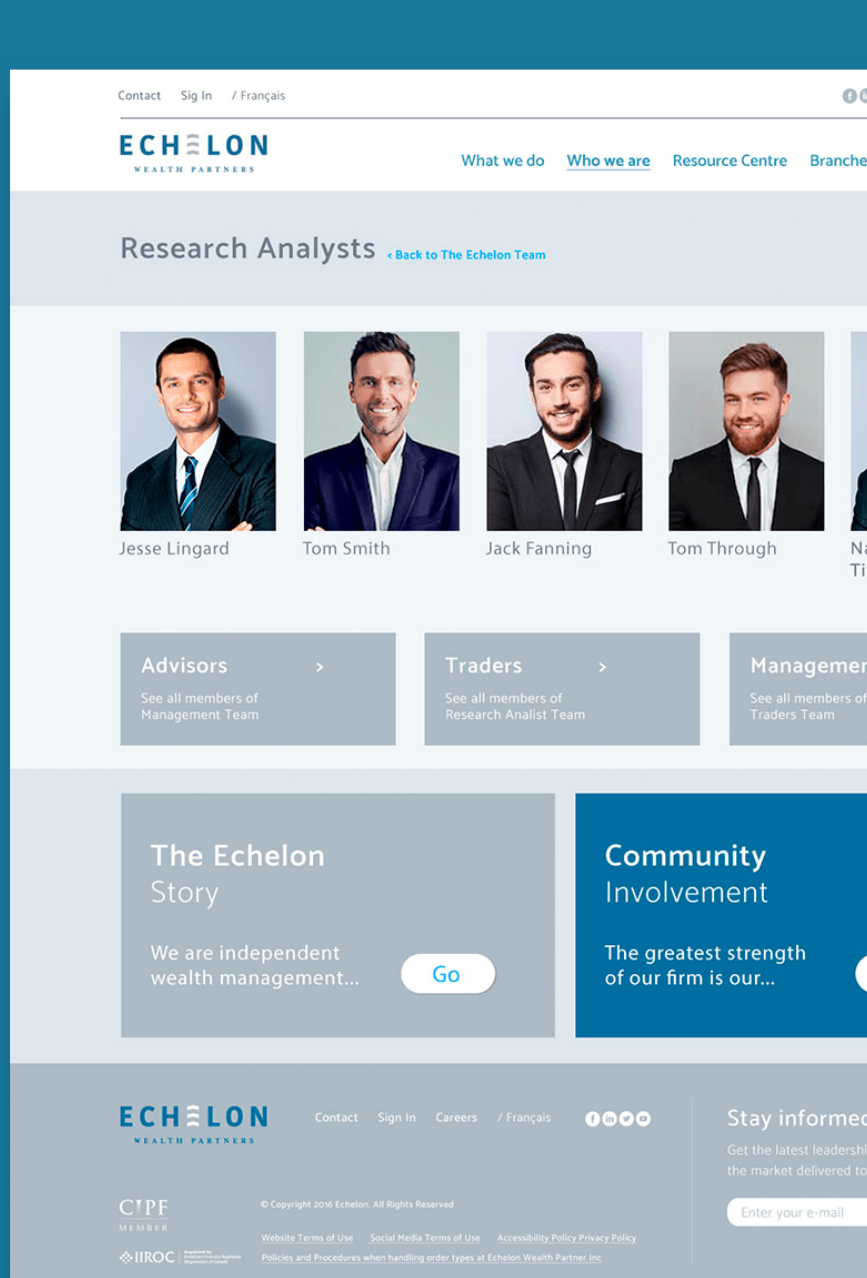


## How We Did It

Each website was constructed on an open-source Content Management System (CMS) platform with SEO capabilities allowing Echelon's teams to grow, create and edit dynamic content, including images, videos and text, easily in-house. They were also integrated with Google Analytics. Using insights gathered about Echelon's current search engine position and in comparison to competitors, we also defined keywords for all sections of the websites.

FLD created the layout, sitemap and design for the websites. Since Echelon already had an array of content and documents available about the company, we worked to simplify their existing copy, making it more clear and persuasive, while including the identified SEO keywords and inviting Call to Actions (CTAs). We did the same for the biographies of each member of Echelon's management team and advisors.

To make the transition to the new website as seamless as possible, FLD provided full documentation and training for Echelon's employees.



## Results

The creation of websites with CMS and SEO capabilities has enabled Echelon and their teams to easily manage all of their content and marketing efforts in-house. Helping to streamline and simplify complex tasks, the improved websites have been designed to scale with Echelon's growing business while requiring less effort to update information about their services and maintain their presence online. The new clean, well-branded and professional look of the websites, along with content that clearly illustrates what the company has to offer, their mission and values, provides consumers with a true representation of the Echelon brand. Visitors can now easily navigate the websites from any screen, as well as search, find, download and share information from the sites instantly.

