

Rock Pointe

INSURANCE

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BRAND GUIDE



## Concise

## Extended



### PURPOSE

Empower clients with optimal insurance solutions, prioritizing financial security through a consultative approach.

“Why do we exist?” At Rock Pointe Insurance, our primary purpose is to provide a consultative approach to insurance in the personal and commercial industry. Our commitment is to give clients the best options while emphasizing the foundational importance of maximizing financial security. We aim to offer comprehensive and competitive insurance products, coupled with proactive education, to prepare our clients for any potential claims and empower them to plan for the future.



### VISION

Forge a communicative and supportive workplace, achieving organic growth and strategic acquisitions for sustained success.

“Where do we want to go?” Our vision for the future of Rock Pointe Insurance is to establish a healthy working environment centered on great communication and guidance for all clients. Over the next 5-10 years, we envision organic growth through existing and new clients, as well as strategic acquisitions of other 'books of business.' Key achievements include maintaining a book of business worth \$10 million with a calculated yearly increase and remitting \$2.5 million to \$5.0 million in premiums to carriers.



### MISSION

Dedicate daily efforts to client care and connections, offering comprehensive insurance options and proactive community engagement.

“What do we do?” On a day-to-day basis, Rock Pointe Insurance is dedicated to ensuring the well-being of our current clientele through attentive care while actively seeking new connections. Our core activities include maintaining operations for client needs and engaging in proactive marketing and outreach within local business communities. To differentiate ourselves, we focus on delivering on promises, educating clients, and using competitive products that prioritize their best interests over our bottom line.



### VALUES

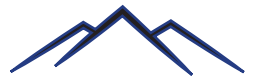
Prioritize client financial stability, uphold integrity, honesty, and perseverance in every decision, and cultivate a team that embodies these values.

“What do we stand for?” Our core values - prioritizing the best, most financially stable situation for the client, integrity, honesty, and perseverance - guide every action and decision at Rock Pointe Insurance. We demonstrate these values by hiring individuals who align with our core values and implementing regular assessments to ensure alignment. We maintain transparency in conversations and submissions to clients and carriers, and we persevere in serving even the most challenging clients to provide the best advice and service available.

### ADDITIONAL INSIGHTS

Rock Pointe Insurance aspires to redefine industry norms, emphasizing honesty, innovation, and technological ease through a customized app, ensuring a trusted partnership for clients' financial well-being.

Rock Pointe Insurance strives to transcend the traditional sales approach, focusing on honesty and innovation. We aim to be pioneers in the industry by investing in technology that creates an easy-to-use portal for our clients. This includes developing a customized app that allows quick access to policies, facilitates update requests, and encourages clients to share the app with friends and colleagues. Our commitment is not just to be a service provider but a trusted partner in safeguarding our clients' financial well-being.





Fonts

Rock Pointe  
INSURANCE

PT. Size Ratio  
24  
11

Source Serif Variable, Roman

SOURCE SANS VARIABLE, REGULAR

ALL CAPS  
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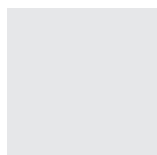
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Gradients



Elements

