

Creating the measurable difference

**North Carolina Total Retirement Plans
Brand Process**

September 4, 2013

Process: State and vendors involvement

- **Weekly status calls-** CoreBrand facilitated weekly status calls beginning in May 2013 with the State of North Carolina, Prudential and TIAA-CREF to create a dialogue from the onset with all parties crucially involved in moving the branding project forward.
- **Benchmarking-** CoreBrand reviewed five other State retirement plans (California Savings Plus, Florida, Maryland, South Carolina and Virginia) to create benchmarking standards for North Carolina's own brand.
- **Discovery process-** CoreBrand conducted seven stakeholder interviews in May 2013 with 10 employees from the State, Prudential and TIAA-CREF to gain insight on the current supplement program, program objectives, communications and goals for the new brand.
- **Goals-** The group collectively established goals for the new brand.

Creative brief and brand goals

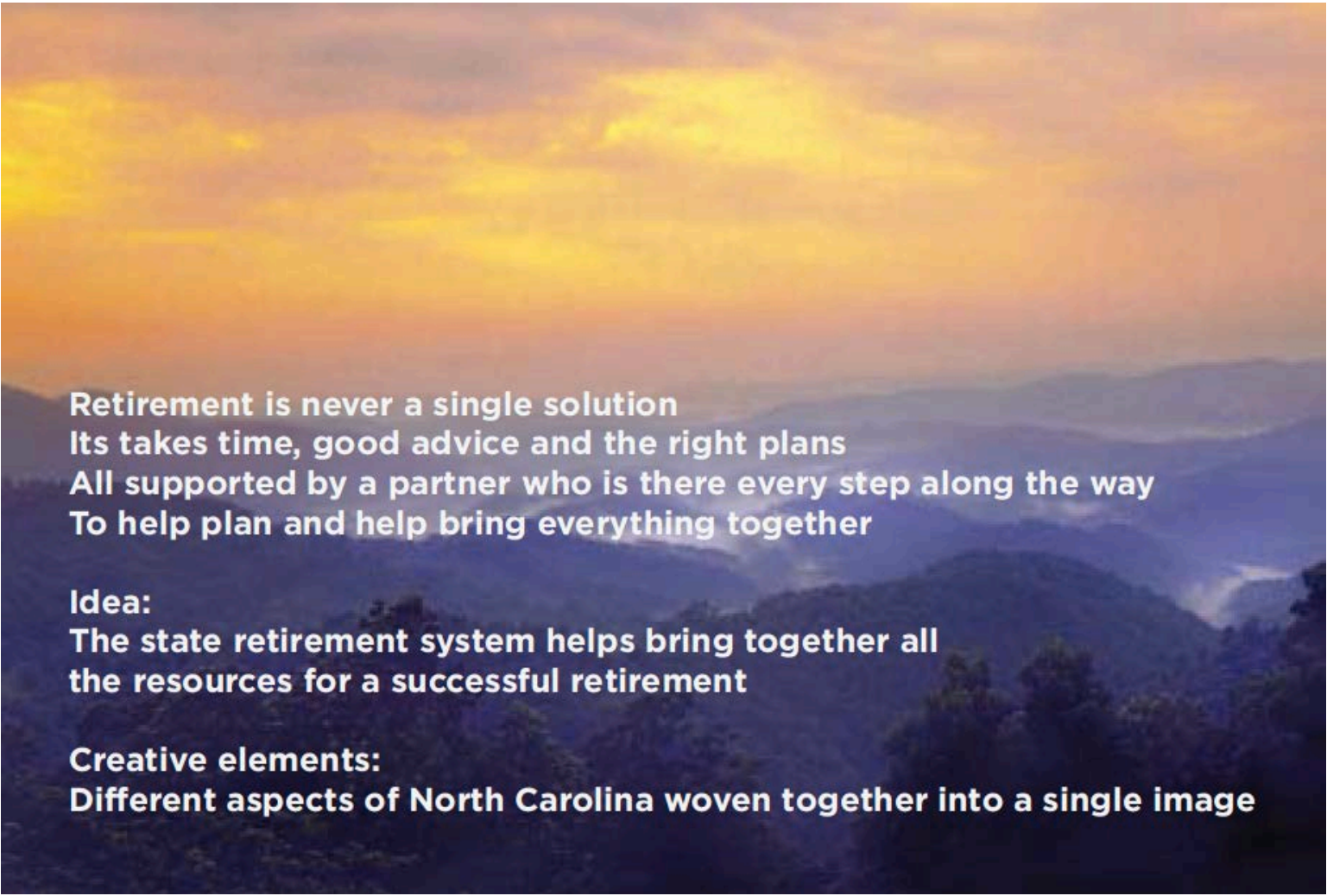
CoreBrand developed creative brief providing clear and defined goals for what the new brand logo and look and feel should embody for overall program success:

- Integration of the new program offering
- New energy
- Plan branding modernization
- Increased awareness
- Enrollment and retirement readiness

Creative exploratory

- CoreBrand developed creative concepts along a visual spectrum with a look close to the existing State brand to moderately different to concepts pushing boundaries.
- CoreBrand refined several concepts with Prudential and TIAA-CREF prior to a first formal in-person presentation to the State on 6/27.
- With feedback from the State, Prudential and TIAA-CREF, CoreBrand refined concepts for a second in-person formal presentation to the State on 7/10.
- Upon the second presentation the State provided feedback and selected a final creative concept titled “Bringing It All Together” and chose to rename the supplemental retirement program “North Carolina Total Retirement Plans.”
- CoreBrand worked with the State to further refine this concept, colors, shape, logo lockup, until a final logo was developed and approved.

Big idea- Bringing It All Together



**Retirement is never a single solution
It takes time, good advice and the right plans
All supported by a partner who is there every step along the way
To help plan and help bring everything together**

Idea:
**The state retirement system helps bring together all
the resources for a successful retirement**

Creative elements:
Different aspects of North Carolina woven together into a single image

Visual elements- Bringing It All Together



North Carolina
Total Retirement Plans



Celebrating a diverse and beautiful state

The new visual identity for the North Carolina Total Retirement Plans was inspired by the state itself. With a diverse and beautiful topography to reference — mountains and forests, unspoiled beaches and oceanfront, and the warm North Carolina sunshine — we created a powerful metaphor for the tenets of solid retirement planning. When all of the natural and cultural elements of our state come together, you have a great place to live. When all the different products in the plan are leveraged, you have a more robust retirement portfolio.

Brand applied to collateral



Brand launch

- CoreBrand has created brand guidelines to be used by all parties issuing the program benefits, the State, Prudential and TIAA-CREF, to ensure the brand is properly represented in all communication materials.
- The “North Carolina Total Retirement Plans” will be launched in early October 2013 in conjunction with National Save for Retirement Week and the North Carolina State Fair.
- The new brand will be applied to existing materials.