



COMPANY OVERVIEW

Founded in 1941, BlueShore Financial is a boutique financial institution providing a full range of personal and business banking, wealth management, insurance and commercial lending solutions. With 12 branches across the Lower Mainland and Sea-to-Sky Corridor, BlueShore Financial helps clients achieve financial wellness®

through personalized solutions and expert advice, delivered in a unique Financial Spa® branch environment. BlueShore Financial manages over \$4.9 billion in assets under administration, is consistently ranked among the top financial planning firms in Metro Vancouver, and has been named one of Canada's Best

Small and Medium Employers six years in a row. As an Imagine Canada Caring Company, BlueShore Financial donates at least 1% of pre-tax profits annually to charities and not-for-profit organizations within the communities it serves.

CHALLENGE

BlueShore was searching for a dedicated PR partner to contribute to their business growth by increasing brand awareness. Despite a stable of experienced spokespeople and a vast range of personal finance topics and breaking news to provide commentary on, BlueShore did not meet with satisfaction the media goals they set out to accomplish in terms of the volume and quality of media placements garnered.

With Magnolia's differentiator in working with finance and business reporters, Magnolia seized the opportunity to be BlueShore's strategic PR agency. Magnolia has consistently provided relevant opportunities in recognized consumer and trade media on a national and local scale.

STRATEGIES

1. **Media Relations Program** – Position BlueShore as a corporate thought leader and industry expert. Demonstrate advisors' sophisticated financial expertise in tier one media in Canada.
2. **Media Training** – Empower financial advisors with the interview tools to provide media with sound bites.

TESTIMONIAL

“ Working with Magnolia, we've learned to truly value what a PR agency can accomplish for our business objectives. They work proactively with our team on a daily basis by developing independent and creative story ideas for us and coordinating new media opportunities for us. The team is a seamless extension of our communications team, consistently dedicated to positioning our company as a leading financial services provider. ”

— **Armita Seyedalikhani**,
Director, Communications and Corporate Affairs, BlueShore Financial

RESULTS SAMPLES OF WORK

By consistent and relevant outreach to business, economics and personal finance media, Magnolia enabled positive success outcomes for BlueShore's brand in target media outlets.

BlueShore's executive management team and financial advisors have built new relationships with national journalists where they have demonstrated their industry acumen and financial expertise.

Consistent personal finance commentary among national and local business press



Net new coverage in tier one media



Strong corporate voice as an industry thought leader in the credit union space

THE GLOBE AND MAIL*

THE VANCOUVER SUN

Trade media outreach to HR and marketing industries



BUSINESS VANCOUVER

RESULTS METRICS



On average 10-12 tier one hits per quarter including national broadcast and dailies



Building net new relationships with tier one media



Contribute to attracting top talent by engaging in HR stories