INTERNAL STRATEGY DOCUMENT

# Power of the Purse®
# Activation & Brand Stewardship Plan

A practical roadmap for renewing, scaling, and protecting InVestra's established women's financial education platform across financial planning, retirement consulting, wealth management, wealth transfer planning, and educational seminars.

| | |
|---|---|
| **Prepared for** | InVestra leadership, marketing, advisory, operations, and compliance teams |
| **Strategic posture** | Reintroduce and scale an existing brand—not a cold launch |
| **Registered scope** | International Class 036 and Class 041 services provided by management |
| **Heritage asset** | Longstanding seminar identity, women's-wealth programming, and the lightning-bolt attendee pin tradition |
| **Status** | Working plan for leadership and legal/compliance review |

**Trademark-form control:** Use the registration certificate as the source of truth for the exact registered wording and symbol placement. This report uses "Power of the Purse®" as provided by management. The ® symbol belongs only next to the trademark itself—not next to slogans, descriptors, event themes, or ordinary copy unless those items are independently registered marks.

Prepared: September 10, 2026

# Executive Summary

**Strategic thesis.** Power of the Purse® should be treated as InVestra's flagship women's financial education and community platform. Unlike a newly created campaign, it already carries institutional history, a recognizable seminar concept, an established home inside InVestra's Women's Wealth presence, and a memorable attendee artifact—the lightning-bolt lapel pin. The priority is therefore to preserve what made the program distinctive while converting it into a modern, measurable pathway from education to financial planning and wealth-management relationships.

**Recommended brand role:** Power of the Purse is the experience/community brand; Her Golden Nest Eggs is the individual planning pathway. They can reinforce one another without competing for the same role.

### The next 12 months should focus on six outcomes:

- **Recover the heritage:** Inventory past seminar decks, invitations, photos, attendee lists where legally retained, logos, pins, press, webpages, and advisor recollections so valuable brand history is not lost.
- **Reestablish a flagship seminar cadence:** Make Class 041 use visible through recurring educational events under the mark, with a consistent experience and clear planning themes.
- **Connect education to Class 036 services:** Route attendees into optional financial planning, retirement-plan consulting, investment advisory, wealth-management, and wealth-transfer conversations where appropriate.
- **Modernize the alumni effect:** Use the lightning-bolt pin and an opt-in alumni/community concept to create recognition, referral energy, and repeat engagement without turning the pin into a separate retail product.
- **Integrate with InVestra Women's Wealth:** Use the existing website content and women-focused editorial library as the always-on digital layer supporting events and consultations.
- **Protect and measure the asset:** Adopt exact trademark-use standards, archive proof of use, track conversion and retention metrics, and review all financial-services communications before release.

### What makes this plan different from the Golden Nest Eggs plans

The Golden Nest Eggs marks are new brand platforms that require market introduction. Power of the Purse has prior equity. The recommended approach is "heritage relaunch": audit, preserve, refresh, and scale—not rename, over-redesign, or disconnect the brand from the women who already experienced it.

# 1. Existing Brand Equity and Public Footprint

### What the public web already shows

InVestra currently maintains a dedicated "The Power of the Purse" page within its Women's Wealth navigation. The page thanks attendees of recent events, lists a mix of educational and relationship-oriented programs, displays a Power of the Purse logo image, links to financial-management services, and feeds into a substantial Women's Wealth article library. Publicly visible article dates on that page extend back at least to November 2023, supporting the view that the brand sits inside an established women-focused content ecosystem rather than a one-time event campaign.

| Public evidence | Observed signal | Internal implication |
|---|---|---|
| **Dedicated InVestra page** | Power of the Purse appears as a named destination under Women's Wealth. | Retain a permanent branded hub; do not make the program event-only. |
| **Event history on current page** | The page references recent webinars, networking, tea, social and educational events. | The brand can support both formal financial education and relationship-building experiences, subject to compliance classification. |
| **Women's Wealth editorial library** | The page surfaces women-focused planning, investing, retirement, life-transition and generational-wealth content dated 2023–2026. | Build event topics from the existing editorial engine and cross-link content to consultations. |

| Public evidence | Observed signal | Internal implication |
|---|---|---|
| **Trademark public record** | A third-party trademark database lists InVestra Financial Services Incorporated as applicant and shows Classes 036 and 041. | Use InVestra's registration certificate/official counsel records—not an aggregator—as the final authority for status and exact wording. |

### Heritage evidence to recover internally

- **Seminar archives:** Past invitations, sign-in/registration records, decks, handouts, photos, venue invoices, speaker notes, email campaigns and follow-up sequences.
- **Lightning-bolt pin:** Original artwork/specifications, vendor invoices, photographs, remaining inventory, packaging, internal meaning/story, and any rules historically used for presentation to attendees.
- **People and stories:** Founders/presenters, long-time attendees, advisors, community partners, referral sources and staff who can document what the program meant and what audiences responded to.
- **Legacy brand assets:** Prior logos, color systems, taglines, web graphics, social posts, press coverage, event signage and giveaways.

**Research limitation.** The current public web search did not independently verify the historical lightning-bolt pin program. Management's description should therefore be treated as internal historical knowledge until supported by archived photos, vendor records, event materials, or attendee documentation.

## 2. Recommended Brand Architecture

### Position Power of the Purse as the umbrella experience

| Brand | Primary job | Best use | Avoid |
|---|---|---|---|
| **Power of the Purse®** | Women's financial education, community, and event experience | Seminars, workshops, content hub, networking/education programs, alumni engagement | Reducing it to a generic "women and money" seminar or using it as a product/account name |
| **Her Golden Nest Eggs** | Individual retirement and wealth-planning pathway | Landing page, consultation campaign, planning checklists, targeted educational content | Making it indistinguishable from Power of the Purse or implying women receive a different standard of advice |
| **His Golden Nest Eggs** | Parallel individual planning pathway for men | Retirement and wealth-planning campaigns, consultation funnel, educational content | Mixing it into Power of the Purse programming in a way that dilutes the women-focused community identity |

### Recommended relationship between the brands

- Power of the Purse event attendee → optional "Her Golden Nest Eggs" planning consultation where the individual wants a deeper retirement/wealth-planning conversation.
- Women's Wealth article → Power of the Purse seminar registration → consultation → normal InVestra advisory/wealth-management process.
- Existing female clients → Power of the Purse annual event → invite a friend/daughter/colleague → education-first introduction to InVestra.

## 3. Map the Trademark to the Registered Services

### Class 036 activation

| Registered service | Recommended use under the brand | Evidence/use channels |
|---|---|---|

| Registered service | Recommended use under the brand | Evidence/use channels |
|---|---|---|
| **Financial planning consultation** | Power of the Purse planning consultation following an event or content interaction | Dedicated service page; follow-up invitation; advisor scheduling page |
| **Financial retirement plan consulting** | Retirement-readiness and income-coordination discussions | Seminar follow-up; retirement workshop; consultation materials |
| **Financial planning and investment advisory services** | Education-to-advisory pathway using the mark with a generic service descriptor | Landing page; brochure; approved digital campaign |
| **Providing information in financial planning** | Women-focused articles, guides, checklists and FAQs | Website hub; newsletter; seminar handouts |
| **Providing information in wealth management** | Educational content on investment coordination, tax-aware planning concepts and family wealth issues | Content hub; webinar; panel discussion |
| **Financial wealth management / wealth management services** | Branded introduction to InVestra's wealth-management process | Service landing page; consultation materials; approved campaign |
| **Wealth transfer planning** | Legacy, beneficiary, family-meeting and inheritance-planning conversations | Seminar module; checklist; planning consultation |

### Class 041 activation

Seminars should remain the flagship proof point. The mark should appear prominently in the title/identity of financial-planning and wealth-management seminars, while the body of the event remains genuinely educational and individualized recommendations are moved into a separate consultation process.

## 4. Rebuild the Power of the Purse Seminar Experience

### Recommended event promise

A practical, welcoming financial-education experience that helps women organize the decisions that intersect around retirement, investing, major life transitions, family wealth, and legacy—without assuming that women are a single homogeneous investor segment.

### Core seminar formats

| Format | Illustrative theme | Purpose |
|---|---|---|
| **Flagship annual event** | Power of the Purse: Plan, Invest, Manage, Transfer | Large-format brand event; education + community + advisor visibility |
| **Quarterly workshop** | Retirement Readiness for What's Next | Deeper education and consultation conversion |
| **Life-transition workshop** | Single Again? Financial Decisions After a Major Change | Responsive education around widowhood/divorce/major transition where appropriate |
| **Wealth-transfer conversation** | The Legacy Women Build | Bring family, beneficiary and next-generation issues into planning |
| **Business-owner session** | From Business Success to Personal Wealth | Reach female founders/executives with planning and wealth-management needs |

| Format | Illustrative theme | Purpose |
|---|---|---|
| **Networking + education** | Women, Wealth & What's Next | Lower-friction relationship-building with a substantive financial education component |

### Seminar operating standards

- **Educational first:** Use a documented agenda with clear learning objectives; avoid turning the seminar into an extended product pitch.
- **Approved materials:** Pre-review invitations, slides, handouts, speaker scripts/talking points, case examples, statistics, testimonials and follow-up calls to action as applicable.
- **Structured follow-up:** Within 24–48 hours send educational materials and an optional consultation invitation; do not imply attendees need to become clients to receive the educational benefit.
- **Proof-of-use archive:** Save dated event pages, invitations, slides, photos of signage, handouts, attendance/registration evidence where permitted, and post-event communications.

## 5. Restore the Lightning-Bolt Pin as a Heritage Asset

### Strategic role of the pin

The lightning-bolt lapel pin is unusually valuable because it can convert an intangible seminar into a visible badge of participation and a story trigger. It should be treated as a ceremonial attendee recognition item tied to the Power of the Purse experience—not as a separate investment product, status guarantee, or general merchandise line.

| Use case | Recommended treatment | Guardrail |
|---|---|---|
| **Seminar recognition** | Present at the close of an eligible Power of the Purse seminar with a short explanation of its history. | Confirm historical design ownership/vendor rights and current compliance treatment before relaunch. |
| **Alumni identity** | Invite prior attendees to wear the pin at future events and identify themselves as past participants. | Use voluntary participation; avoid implying credentials, certification, investment sophistication or client status. |
| **Referral conversation** | "Bring a woman who should be part of this conversation" invitation to alumni. | Review referral/compensation issues; do not tie the pin to paid solicitation unless separately approved. |
| **Photography/content** | Use event photography showing attendees wearing the pin. | Obtain appropriate photo/media permissions and advertising approvals. |
| **Digital extension** | Optional "Power of the Purse alumna" email/CRM tag or event badge. | Keep internal labels factual; do not create an unregistered certification-mark impression. |

### Recommended internal task: reconstruct the pin story

- Identify when the first pins were produced and why the lightning bolt was chosen.
- Locate the original manufacturer, artwork and purchase records.
- Interview the program founders/long-time staff and document the approved historical narrative.
- Photograph an original pin professionally and store the image with the brand standards.
- Decide whether pins remain attendee-only, and write a one-paragraph internal eligibility rule.

## 6. Customer Journey: Community → Education → Planning

| Stage | Experience | Primary objective |
|---|---|---|

| Stage | Experience | Primary objective |
|---|---|---|
| **1. Awareness** | Women's Wealth content, advisor/community outreach, social posts, partner invitations | Introduce relevant financial questions without fear-based messaging |
| **2. Event** | Power of the Purse seminar/workshop/networking education | Create trust through useful education and human connection |
| **3. Follow-up** | Recap, checklist, article links, optional planning consultation | Convert interest into an individual conversation |
| **4. Planning** | Financial planning or retirement-plan consultation | Organize goals, facts, priorities and decisions |
| **5. Advisory/wealth management** | Normal InVestra engagement process when appropriate | Deliver services under applicable agreements and standards |
| **6. Community loop** | Annual event, alumni invitation, next-generation or friend introduction | Increase retention, referrals and brand advocacy |

### Digital hub structure

- Hero section: Power of the Purse mark + plain-English descriptor ("Women's Financial Planning & Wealth Education").
- Brief heritage statement: established InVestra program; education, confidence and community.
- Upcoming-event area without permanent date/time/location placeholders in evergreen creative.
- Topic pathways: retirement, life transitions, investing/wealth management, legacy/wealth transfer.
- "From the Women's Wealth library" article feed.
- Optional consultation CTA using InVestra.com and approved toll-free number.
- Past-event gallery/heritage section only after rights and consent review.

## 7. Content and Partnership Strategy

### Use the existing Women's Wealth editorial engine

The current Power of the Purse page already surfaces women-focused articles on retirement, life transitions, tax planning, generational wealth and investing. Rather than create a separate content operation, tag selected pieces as "Power of the Purse resources" and use seminars to generate the next wave of questions and topics.

| Content pillar | Examples | Best activation |
|---|---|---|
| **Retirement readiness** | Income needs, longevity, Social Security/Medicare coordination at a high level, sequence of decisions | Workshop + checklist + consultation |
| **Life transitions** | Widowhood, divorce, career change, caregiving, inheritance | Small-group seminar + planning guide |
| **Wealth management** | Investment coordination, risk, cash reserves, tax-aware planning concepts | Panel + article/video series |
| **Wealth transfer** | Beneficiaries, family communication, charitable intent, next generation | Family-wealth seminar + conversation guide |
| **Women in business** | Owner compensation, succession, concentrated wealth, retirement-plan choices | CPA/attorney partner event |

### Partnership model

- **CPAs and attorneys:** Co-host education on tax/estate concepts with roles and disclaimers clearly defined; avoid suggesting InVestra provides legal or tax advice when it does not.
- **Employers and professional groups:** Offer educational sessions for women's networks, executives and business owners.
- **Community organizations:** Use the brand selectively where audience fit is strong and sponsorship/referral rules are understood.
- **Centers of influence:** Invite trusted professionals to panels rather than relying only on advisor-led lectures; document compensation and promotional relationships.

## 8. 12-Month Heritage Relaunch Roadmap

| e | Timing | Primary deliverables | Exit criteria |
|---|---|---|---|
| **ritage audit** | Weeks 1–4 | Collect old event materials, pin records, brand files, photos, webpages, vendor records and attendee history; confirm certificate details and naming standard | Approved heritage archive; e trademark form confirmed; p ownership/story documente |
| **ital reset** | Weeks 5–8 | Refresh Power of the Purse hub; connect Women's Wealth content; create seminar deck template, invitation, follow-up email and consultation page | Core assets approved and liv CRM source tracking tested |
| **gship relaunch** | Weeks 9–16 | Conduct first refreshed seminar; reintroduce pin; capture compliant photos/evidence; execute 48-hour follow-up | Attendance and conversion available; proof-of-use archi complete |
| **dence & partners** | Months 5–8 | Quarterly workshops; one partner/co-hosted event; alumni invitation test; short-form educational video | Repeatable event economics compliance workflow establ |
| **titutionalize** | Months 9–12 | Annual event calendar; alumni/community playbook; advisor training; KPI dashboard; next-year budget | Leadership decision on scale markets, partnerships and content investment |

### First 30 / 60 / 90 days

| | Priority actions |
|---|---|
| | Heritage and trademark audit; locate pins and old materials; define relationship to Her Golden Nest Eggs; ir content; set CRM source tags; build approval checklist. |
| | Refresh the digital hub; finalize seminar experience and pin protocol; create invitation, deck, handout, reca consultation CTA and partner kit; train advisors/speakers. |
| | Run flagship relaunch; archive evidence; follow up attendees; survey usefulness; measure consultation rec conduct post-event legal/compliance and brand review. |

## 9. Trademark Usage and Governance

### Non-negotiable symbol rule

**Use ® only immediately next to the actual registered trademark.** Do not append ® to slogans, campaign lines, event themes, section headings, ordinary phrases, or visual motifs merely because they appear on the same marketing piece.

- **Exact wording:** Use the exact registered form shown on the certificate. Management currently refers to the mark as "Power of the Purse." A public third-party record displays "THE POWER OF THE PURSE," so counsel should reconcile the exact form before the next print run.

- **First-use practice:** A prominent first use such as "Power of the Purse® Educational Seminar" is normally sufficient for a piece unless counsel directs otherwise; repeated symbols throughout the same flyer are unnecessary.
- **Generic descriptor:** Where practical, follow the mark with a generic descriptor, e.g., "Power of the Purse® Educational Seminar" or "Power of the Purse® Financial Planning Consultation."
- **Do not genericize:** Do not use "power of the purse" as the generic name for the seminar category or planning service in a way that erodes brand significance.
- **Promotional merchandise:** Treat the pin as a promotional/recognition item incidental to the services. If InVestra plans to sell merchandise or use the mark as a separate jewelry/apparel brand, obtain a separate trademark-scope review.
- **Archive continuously:** Maintain dated specimens/evidence by class and year, including the digital hub, seminar materials, service pages and communications showing the mark used with covered services.

### Maintenance calendar

For a federal registration based on use in commerce, USPTO maintenance generally requires a Section 8 declaration between years 5–6 and a combined Section 8/9 filing between years 9–10 and each ten-year period thereafter. Counsel should calendar the actual dates from the registration certificate and preserve suitable specimens continuously.

## 10. Financial-Services Communications Guardrails

### One review standard across events and marketing

- **Claims:** Avoid guarantees, "safe" wealth language, unsupported superiority claims, fear-based claims, or material facts that cannot be substantiated.
- **Performance:** Do not add investment performance, hypothetical results, backtests or selective client outcomes to event/marketing materials without specific review under applicable advertising rules.
- **Testimonials and attendee stories:** If alumni quotes, photos or endorsements are used, document whether the person is a client, whether compensation or gifts are involved, required disclosures, consent, and applicable oversight.
- **Seminar remarks:** Pre-approved slides do not eliminate responsibility for live statements. Speakers should be trained on recommendations, products, performance and individualized questions.
- **Non-cash items:** Because pins and gifts have value, compliance should confirm treatment under the rules applicable to the sponsoring entity, attendee type, referral arrangement, and any partner relationship.
- **Books and records:** Archive final disseminated advertisements, event materials, approvals and evidence of use according to the applicable entity's retention requirements.

**Regulatory baseline.** Where applicable, the SEC investment-adviser Marketing Rule prohibits materially misleading advertising and imposes conditions on testimonials, endorsements and performance presentations; FINRA Rule 2210 contains standards for public communications and public appearances, including seminars. The sponsoring legal entity and communication type determine the exact review path.

## 11. Measurement Framework

| Layer | Metrics | Management question |
|---|---|---|
| **Brand recovery** | Historic assets inventoried; legacy attendee records matched where permitted; pin inventory/records recovered | How much existing equity can be reactivated rather than rebuilt? |
| **Awareness** | Branded search, Power of the Purse page traffic, article referrals, partner reach | Is the brand regaining visibility? |
| **Event engagement** | Registrations, attendance, repeat attendance, guest rate, content ratings | Does the experience earn attention and trust? |
| **Conversion** | Consultation requests, consultation show rate, qualified opportunity rate | Does education translate into useful planning conversations? |
| **Commercial** | New relationships, revenue/AUM influenced, acquisition cost, referral-source pipeline | Is the platform economically meaningful? |

| Layer | Metrics | Management question |
|---|---|---|
| **Community** | Alumni opt-in, referral/guest introductions, repeat-event participation | Is the brand building an enduring network rather than one-time attendance? |
| **Compliance/IP** | Approval turnaround, revision rate, proof-of-use completeness, trademark deviations | Can the platform scale without control failures? |

## 12. Principal Risks and Mitigations

| Risk | Why it matters | Mitigation |
|---|---|---|
| **Over-modernizing the brand** | Could erase the program's heritage and recognition | Preserve the core name, pin story and community feel; refresh execution rather than reinventing identity |
| **Gender stereotyping** | Can reduce trust and misrepresent client needs | Focus on life circumstances and planning decisions; do not treat women as a monolithic investor type |
| **Confusion with Her Golden Nest Eggs** | Two women-focused brands can compete internally and externally | Define Power of the Purse as the event/community platform and Her Golden Nest Eggs as the individual planning pathway |
| **Improper ® placement** | Creates avoidable trademark-use errors and visual clutter | Use ® only adjacent to the actual mark and only as directed by the registration/counsel |
| **Pin becomes an implied credential** | Attendees could perceive it as certification or status | Describe it only as commemorative attendee recognition; no expertise/certification claims |
| **Event becomes sales-heavy** | Weakens trust and may create compliance issues | Document educational objectives; separate individualized advice and product recommendations into appropriate meetings |
| **Historical claims cannot be substantiated** | "Longstanding" claims may be challenged if records are thin | Build a dated heritage archive before publishing specific first-use years, attendance totals, or "since ____" claims |

## 13. Leadership Decisions and Immediate Next Actions

### Decisions leadership should make now

- Confirm Power of the Purse as the flagship women's event/community brand and Her Golden Nest Eggs as the planning-conversion pathway.
- Authorize a 30-day heritage audit and designate one owner for archived materials, including the lightning-bolt pin history.
- Select one flagship relaunch event in the next 90–120 days and one quarterly workshop theme to follow it.
- Approve a permanent Power of the Purse digital hub rather than temporary event pages.
- Approve a simple pin protocol: attendee eligibility, presentation moment, inventory control, photography permission and no credential implication.
- Require trademark-counsel/compliance review of exact registered wording and ® placement before the next public print/digital run.
- Adopt CRM campaign/source codes so Power of the Purse leads, consultations and new relationships can be measured separately.

### Recommended one-sentence internal positioning

**"Power of the Purse is InVestra's signature women's financial education and community**

**experience—designed to turn knowledge and connection into clearer planning conversations.”**

# Appendix A. Public-Source Research Snapshot

These sources were used only to establish the present public footprint and regulatory context. InVestra’s own records, registration certificate and counsel guidance should control any historical, ownership, registration-status, or first-use statement.

| Source | Why it matters | Link |
|---|---|---|
| **InVestra Financial — “The Power of the Purse”** | Current branded page under Women’s Wealth; lists recent events, links to services, and surfaces women-focused articles dated 2023–2026. | Open source |
| **Justia Trademarks — THE POWER OF THE PURSE, Serial No. 99673946** | Third-party record showing InVestra Financial Services Incorporated, filing date February 27, 2026, and Classes 036/041. The public status displayed at access time may lag management/counsel records. | Open source |
| **SEC — Investment Adviser Marketing, Small Entity Compliance Guide** | Summary of Rule 206(4)-1 advertising, testimonials/endorsements, performance and recordkeeping requirements for advisers subject to the rule. | Open source |
| **FINRA Rule 2210 — Communications with the Public** | Public communication standards and provisions relevant to seminars/public appearances for FINRA members/associated persons. | Open source |
| **USPTO — Maintaining Your Federal Registration** | Maintenance timing for Sections 8 and 9 and supporting use specimens. | Open source |

**Important status note:** Management reports that the trademark has been secured. At the time of this research, a third-party trademark aggregator still displayed the 2026 filing as a new application. This report does not treat that aggregator as authoritative; counsel should verify the current USPTO record and registration certificate before public claims about registration status or the exact registered form.

# Appendix B. Internal Asset Checklist

- Registration certificate and counsel correspondence
- Original/current Power of the Purse logos and archived webpages
- Historical seminar invitations, decks, photos and media releases
- Lightning-bolt pin artwork, vendor records, invoices and photographs
- Historical attendee/registration data subject to retention/privacy rules
- Women’s Wealth article inventory and related digital content
- Approved disclosures, current seminar/follow-up templates, CRM source codes and annual trademark specimen/evidence folder