Brand Management

Brand Governance? Brand Police? No – we're Brand Management!

From strategy to execution everyone must always ask "Is this on-brand? Does it align with the TD enterprise and market strategies, the brand identity? What impact will this have on TD?" and so on. That's where we come in.

Overview Mandate Brand Education Creative Review & Brand Approval Naming Third Party Co-Branding Email Signatures

Mandate

Our team supports Marketing, Business and Channel partners to drive increased Brand Clarity across the Bank. We evolve, educate on, and protect the TD Brand. We do this through a broad range of activities and initiatives including Brand Strategy and Architecture, Verbal, Visual and Sonic Identity, Third Party, Naming as well as Trademark Registration and Protection.

1. Evolve

We're here to ensure the TD Brand is evolving and ahead of those needs (and many others) while consistently delivering on our Brand Strategy, Identity.

2. Protect

Protecting our Brand is as important as building it. Our guidelines and job aids help enable you and all our colleagues to act as Brand Ambassadors.

3. Educate

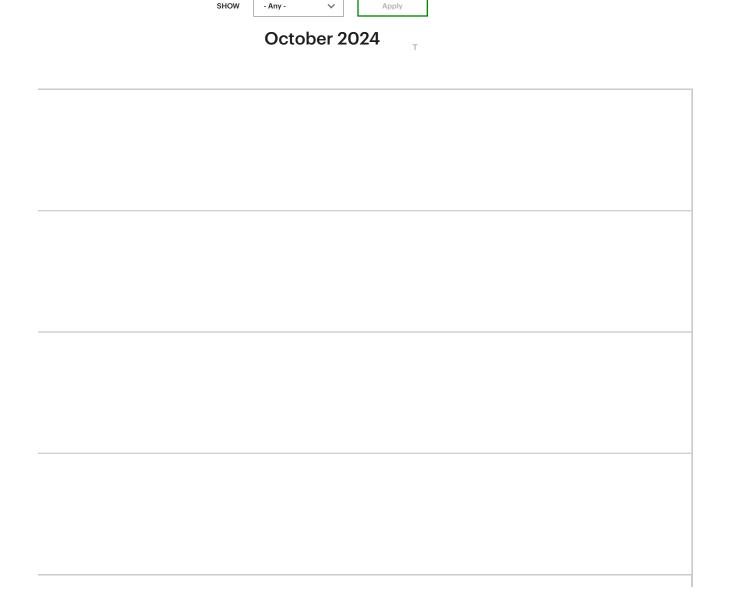
Through Workshops, Newsletters, Brand Queries, or new Tools, we're always looking to share what we know. The more you know, the stronger the TD brand will be.

Brand Education



Join a scheduled, Global Brand Team led session for a more indepth and personal introduction to the TD brand identity.

You'll find all our upcoming sessions listed below, along with notes on the topics we'll cover and an indication of the intended audiences. If you don't see what you're looking for, or want a specialized group session for your team or business, please reach out through the **special request form (/brand-management#brand-education)**.



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Don't see what you're looking for?
Request a session
Creative Review & Brand Approval
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Engage Brand Management Early - Avoid Making Changes Late!

Brand Management is part of the <u>ABEDO</u> (https://myteam.td.com/sites/abedo) approval process in Canada and the US. A reminder that marketing is responsible for providing layouts from agency partners and facilitating Brand Management feedback and approvals.

Brand Review is required for all Tier 1 and Tier 2 campaigns as well as Tier 3 initial templates / concepts.

For more information on the Brand Review Requirement in ABEDO, visit the Resource Center here (https://myteam.td.com/sites/abedo/SitePages/Brand-Identity.aspx).

Brand Management also reviews enterprise creative from internal and external partners outside of Marketing. For creative review, feedback and/or approval, please email TD.BrandQueries@td.com and a team member will respond accordingly. SLA for the Brand Queries inbox is 2 business days.

Naming

Naming is a powerful way for a brand to tell its story – you never get a second chance to make a first impression! A name helps establish the tone for a product or service, it communicates features and benefits and, through time and consistent use, it becomes a valuable asset and intellectual property.

Naming is a simple way to express who we are as a brand and to help deliver on the experiences we want our customers to have. At TD, we have a descriptive naming strategy that's been validated through extensive research – it was established to support our brand through consistent, customer-friendly language that 'simplifies the complicated' for our customers and contributes to the success of our business.

All TD names, whether internal or external, require Brand Management's oversight to ensure they're aligned to Brand. Here's some high-level information about the process:

- Each naming project is different but typical steps include ideation, trademark screening, translation and optional research before the final selection is made.
 - Depending on the complexity, timing can range from 2-16 weeks.
- Brand Management determines if a name is on strategy, while Planners/Business Lead are responsible for gaining internal stakeholder approvals.

To begin the naming process, please complete the Intake & Brief below.

- If the name is external and has high visibility, the Marketing Planner should submit
- If the name is external with low visibility or is internal, either the Marketing Planner or Business Lead can submit
- Once submitted, Brand Management will respond within 48 hours to provide next steps

For more information about our descriptive naming strategy, please click through the PDF below. PDF PDF

Name to be used Internal only

Name to be used External

Third Party Co-Branding

While we value awareness for TD through logo usage, brand risk may be increased through association with companies operating outside our control.

As a result, TD doesn't support the use of the TD name and/or logo by Third Parties without careful consideration. Promotion of a Third Party within the TD environment is also discouraged, unless there is a significant business opportunity.

In order for Brand to adequately assess opportunities, we ask that a Third Party Brand Assessment be completed to evaluate the business opportunity and corresponding risk that the relationship presents.

Definition of Third Party

The following situations all apply to third party:

- 1. A TD product or service that communicates another Company within TD information and/or communications
- 2. A vendor platform, product or service that is being presented by TD but includes reference to the other Company. May be internal or external
- 3. A Company (including Affiliate and Affinity partners) that will feature TD products and/or services and includes TD name and/or logo
- 4. Another Company's name/service that is offered to TD customers (branded or not branded TD)
- 5. A Sponsorship or Corporate donation

Key Criteria

To ensure the opportunity and association benefits TD, a co-branded relationship must;

- 1. Provide a significant business opportunity for TD
- 2. Positively impact the brand; aligning to TD brand principles and positioning
- 3. Provide added value for customers
- 4. Not detract from TD products or offerings

Timing

Brand should be engaged early, when initiation has begun with the Company prior to Contracts being signed. The minimum review period for third party brand assessments is 3-4 weeks from the date of submission.

Third Party Brand Risk Procedure PDF

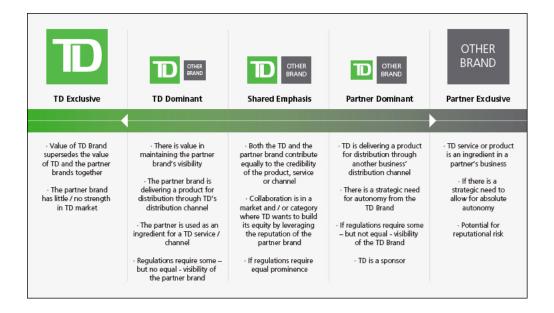
♣ Third Party Brand Scorecard xLsx

Step 1: Key Criteria and Standards	Step 2: Third Party Brand
To ensure the opportunity and association benefits TD, a co-branded relationship must;	
Provide a significant business opportunity.	Please complete the Third
Positively impact the Brand, aligning to our principles and positioning.	When submitting your requ
Provide added value for TD customers/employees.	include the info below in th
Not detract from TD Bank Group products or offerings.	
	Subject Line: Thi
	[Region: CAD, US
Review the Third Party Brand Risk Standards above.	Line of Business
	Business Owner
	Executive Sponso
	Deadlines (if app
	Short description
	If approved, the E
	appropriate copy

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Visual Exposure Approach

The chart below provides a high-level overview of how we approach visual exposure between TD and a Third Party. This will be used to guide Brand's recommendation.



Email Signatures

Email signatures are the equivalent to a company's business card.

They're the same no matter what team, business, location or role you're in. A consistent email signature across the enterprise builds trust and confidence with our customers, partners and team members. Email signatures should only include essential contact information and be included in all outgoing messages. They should not be personalized using creative quotes, taglines, icons, images, awards or slogans and should not be used to promote products or initiatives. Adding anything promotional in nature (eg. a campaign or recent award) to the email signature makes it subject to CASL and could be classified as spam. The recommended essential contact information includes:

First Name Last Name | Title | Group, Business or Department | **Sub-brand** Transit# (if applicable) | Street Address, City, Province/State, Postal Code T: 555 123 4567 | F: 555 123 7890

Your Sub-brand is the name bolded on your Business Card. If you don't have a card or are unsure, ask your People Manager.



Personal pronouns can now be added to your email signature. To learn more about personal pronouns and gender identity, **click here** (https://w3.td.com/td/myintranet/hr/wrkgattd/workingattd/tdprograms/giem/!ut/p/z1/04_Sj9CPykssy0xPLMnMzOvMAfIjo8ziLQK9DQwtDAz9LEwtDAwC:

We've made it easier!

We get it, all these content rules and formatting requirements can be confusing so instead let the Generator do the work. Fill in your information below, hit the button and then copy/paste the results directly into your email software.

Please Note: Client facing individuals in TD Wealth must get their email signatures from MarketMe FP (https://marcomcentral.app.pti.com/Imagine_121/TDMarketMeFinancialPlanning/login.aspx?company_id=24773) or MarketMe PWM (https://marcomcentral.app.pti.com/Imagine_121/TD_MarketMe_2.0/login.aspx?uigroup_id=597257). Email TD.WealthAdviceMarketingStrategy@td.com (mailto:TD.WealthAdviceMarketingStrategy@td.com) if you need access to MarketMe.

Your Info *indicates a required field

1. About you	2. Where you work
First Name *	Transit
Last Name *	Street Address *
Title *	City *
0 / 50 Brand or Sub-Brand *	Country *
Eg. TD Canada Trust, TD Insurance, TD Wealth	Select from list
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Yes, I require a bilingual signature	

Title, in Second Language	
□	
Department, in Second Language	
3. Telecom	4. Options & Personalization
Phone Number	Personal Pronouns
*	Eg. They/Them/Theirs
Mobile Number	Name Pronounciation
Fax Number	
Phone Extension	
Build signature	

Summary

Everything starts and ends with the Brand.