

Market Logics Inc.

Credentials



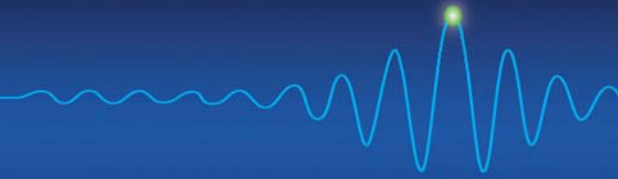
Helping companies unlock their true potential

'We use a disciplined approach to analyze clients' issues and opportunities; identify key business drivers and apply that intelligence to enhance corporate performance. The outcome is a strategy and action plan based on facts.'

George Hartman, President & CEO

Market Logics

Intelligence-Based Solutions



Helping Good Companies Become Great!

Market Logics provides strategic planning, market research and other related services to organizations facing varying performance challenges. We have been evolving our business from our beginnings in 1991 and, today, we specialize in helping clients align their business plans with intelligence-based integrated solutions and advice.

We recognize success means different things to different people. For some it's about improving profitability at their current size; others are looking to expand; some want to consolidate in anticipation of succession plans; many want a stronger brand and marketing program; others seek to implement best practices around client service.

Our clients include global financial institutions, SME's, family businesses, sole practitioners and cultural and sports enterprises. We have worked with a variety of industries including Financial Services, Sports & Entertainment, Retail, Packaged Goods, Health, Publishing and Communications.

Strategic Planning

- Business Planning
- Competitive Landscapes
- Executive & Team Coaching
- Best Practices
- Meeting Facilitation

Market Research

- Corporate Performance
- Client Satisfaction
- Brand Study
- Benchmarking & Best Practices
- Sales Performance

Marketing Communications

- Brand Development
- Integrated Communications
- High Net Worth Program
- Service Level Agreements
- Audit & Best Practices

Sales Performance

- Client Acquisition Programs
- Sales Promotion
- Customer Loyalty Programs
- Advisory Boards
- Personal Coaching

Financial Services Focus

- Succession Planning
- Best Practices
- Business Development
- Wholesaler Performance
- Practice Management



What are your challenges?

Sometimes our clients come to us knowing their specific issues and challenges. In other instances, they simply know that the business is not functioning optimally. In either case we identify the key drivers and best practices exposing the gap between where the company is presently and where it could be. Working with the management team, we then create a road map to elevate their performance.

Strategic Planning

We help clients articulate their unique needs and show them the tools and techniques that will achieve the results they want, in a manner that works for them. Milestones, resource allocation, priorities and timelines are all integral to getting strategy implemented according to the plan.

Market Research

We help clients scope out the issues and trends facing their company and industry. Our customized research approach helps a business reach their objectives by targeting key audiences through various research methodologies to measure specific challenges, products or services.

Marketing Communications

Our integrated marketing strategies help organizations elevate their business, build brand awareness and support the sales force with materials and tools to attract new clients. Companies are fighting to outperform each other by better anticipating and satisfying market needs, sales and client service. The constant challenge is to get closer to the client.

Sales Performance

We work with sales executives and their teams to create an integrated framework that enables them to plan and model sales strategies and ensure timely execution of sales initiatives, while ensuring both front-line sales people and decision-makers have visibility into performance.

Financial Services Focus

Advisors today have to think and act like business owners - managing a dynamic enterprise in an ever-changing marketplace. Regardless of where you are in the evolution of your business, the decisions made today will determine the likelihood of realizing the tremendous economic potential that lies within a practice.



Business Challenges:

Building and maintaining a successful enterprise is quite an accomplishment. The most successful organizations realize that they cannot rest on their laurels for long. True sustainable success comes about only through persistent diligence and continuous improvement.

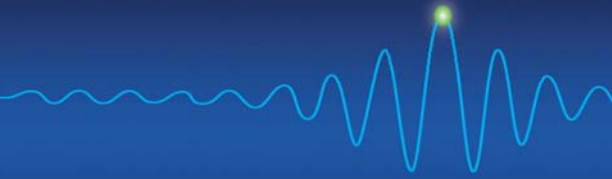
As an enterprise grows and evolves, it becomes more complex and demands increasing higher levels of insight to identify challenges as well as opportunities. Too often, however, those responsible for its success are caught up in the day-to-day world of managing the growth of the business and do not have the luxury of stepping back for a more strategic view to recognize what is working and how emerging trends might affect their industry.

Our role at *Market Logics Inc.* is to bring discipline to the investigative process and, with all the relevant information revealed, assist in the development of an action plan founded on intelligence-based solutions and advice.

Key Business Driver Analysis:



We customize programs for clients depending on their business model, key issues at hand and their specific management challenges and goals. Our unique advantage is that our team can turn a program around within a couple of weeks, react to issues immediately and enhance the program as opportunities arise. Market Logics will help get your company focused on performance and unlocking your full potential.

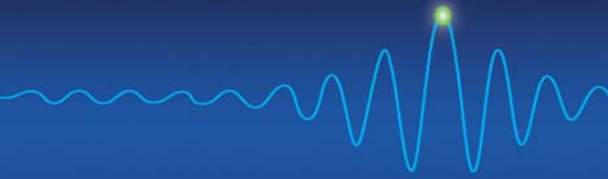


Our clients:

Market Logics has worked with a variety of industries over the past decade including Financial Services, Sports & Entertainment, Retail, Packaged Goods, Health, Publishing and Communications.



Visit www.marketlogics.ca to read client case studies and solutions.



Specialist Expertise on Demand:

Over the past decade, we have worked hard to understand what separates top performing companies from the rest. While there are many contributing factors, one emerging trend is a growing willingness to look outside the organization for expertise on a “needs” basis.

Leading organizations are increasingly outsourcing specialist roles to fill gaps in internal skills and to round out core competencies. The result is:

- *More efficient resource utilization*
- *Enhanced capabilities*
- *Improved effectiveness*
- *Reduced costs*
- *Faster completion times*

We believe in this model so much, we follow it ourselves. Experience has taught us that we can deliver better work in a cost-effective manner with a small internal team, supported by an elite group of specialist professionals, each of whom is recognized in their own right, yet willing to work on behalf of our clients. They bring unparalleled, aggregated capabilities to the table.

We assemble the best combination of people for each project from this pool of enormous talent to provide a truly customized solution for every client. It would be extremely difficult and expensive for any firm to maintain staff of this calibre or to recruit the individuals and manage their collective activities.

Our elite team of specialists are passionate about turning challenging business problems into creative and effective solutions to enhance the bottom line.



Our mission is to provide clients with the highest level of service excellence while at the same time delivering a premium product, on time and on budget.



Founder: George Hartman, MBA, *President & CEO*

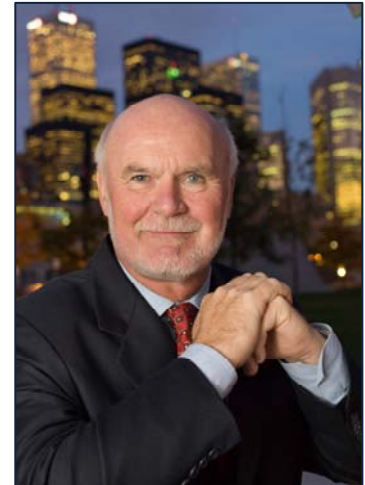
George Hartman’s 40-year career in financial services as an advisor, manager, educator and executive spans both the insurance and investment industries.

In 1985, George joined an investment management firm where, under his direction as VP, Marketing, the assets of that firm grew from \$70 million to more than \$600 million in six years. In 1991, he released his first book, *Risk is a Four Letter Word – The Asset Allocation Approach to Investing*, which quickly became a national best-seller. The sequel, *Risk is STILL a Four Letter Word*, released in 2001, also achieved best-seller status and is still used as a required text in financial advisor courses at a number of Canadian colleges and universities.

George has been a featured speaker at numerous conferences in Canada, the US, Japan, Singapore and Malaysia, including the Million Dollar Round Table (MDRT) Annual International Conference and MDRT’s *Top of the Table*. Currently, George writes a monthly column called *The Coach’s Forum* for the trade journal *Investment Executive* and appears regularly on IE:TV to address the subject of practice management. He is also a featured columnist for the Hong Kong Journal of Financial Planning.

George is CEO of Market Logics Inc., a firm that provides intelligence-based solutions to organizations and individuals looking to take their business to new levels. He specializes in strategic planning and executive coaching. In addition, George presently coaches a number of top-producing advisors in Canada and the US. His most recent book, *Blunder, Wonder, Thunder – Powering Your Practice to New Heights* placed #1 on the Globe & Mail’s Business Book Best-Seller list in its first week of release.

George has a Master’s Degree in Business Administration from Wilfred Laurier University. He presently serves as a judge for the Investor Education Award given each year at the Canadian Investment Awards as well as sitting on the boards of directors of PlanPlus Inc., a global wealth management software developer and a \$200 million NASDAQ-listed nanotechnology firm.



Our Team of Specialists:

- Tessa Wilmott
- Julie Bredin
- Andrea Webb
- Anke Bosma
- Djenane Cameron
- Marnie McBean
- Karen Marren
- Leslie Perkins
- Guy Marini
- Gavin Adamson
- Jeff Roach
- Gary Collins

Visit www.marketlogics.ca to see details on our team.



What our clients are saying:

"The depth and breadth of the work that Market Logics conducted on our behalf revealed strategies for expanding our products and services. The speed with which this was done combined with the quality of work exceeded our expectations. We look forward to working with Market Logics again."

Andrew Stewart, Senior Director, Canadian Securities Institute

"The study developed by Market Logics for our corporate partners, clients and staff was extremely important in helping us establish and measure the key strategic elements important to our organization. More than 1000 participants provided valuable insights into the key drivers of our success to date as well as the things that were detracting from our opportunity to move even further forward in the eyes of our supporters. The resulting action plan has given us direction and specific strategies to close the gap."

Chris Logan, Director, Franklin Templeton Investments

"Their strength is in taking a partnership approach and truly sharing in the success of our program as well as the success of our organization." **Mehendi Kamani, Director, ING Canada**

"We have conducted various forms of research for the past 10 years, and it was wonderful to have the ability to view the survey results dynamically, as well as have our objectives achieved in such a short time frame. We reached over 1000 patrons in less than 2 weeks, far exceeding our expectations."

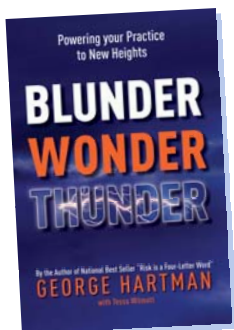
Rachel Hilton, Director, Stratford Festival

"We recently participated in The Corporate Partner Study. In addition to facilitating our strategic planning and helping to determine our areas of focus for the upcoming year, we were applauded by our key clients for seeking their input. It was a definite win for us which I would highly recommend."

Mary Ann MacKenzie, Vice President, Strategic Account Management, Franklin Templeton

"The research program we designed with Market Logics not only enabled us to enhance our online consumer experience but also to prioritize our initiatives based on the measured results and valuable insights gained."

Stacey Allaster, President, Sony Ericsson Women's Tennis Association Tour



Blunder, Wonder, Thunder (by George Hartman with Tessa Wilmott) ...

- **Reaches #1 on the Globe & Mail best-selling business book list (Feb 16, 2010)**
- **Awarded 4 ½ stars out of 5 by industry newspaper Investment Executive (March 2010)**

"This is, honestly, the best practice-management book I have read. Phenomenal! This book should be mandatory reading for any entrepreneur in the financial services industry."

Jason Smith, President, JL Smith Tax Advisory Group, Detroit, and MDRT Top of the Table Qualifier

"Everyone in our industry should read this book. It would make them much more successful."

Clay Gillespie, BBA, CFP, CIM, VP & Portfolio Manager, Financial Advisor, Rogers Group Financial

Contact us for more information or to set up a meeting to discuss your business challenges:

Email: info@marketlogics.ca ● T: 416.489.4848 ● www.marketlogics.ca