



NFP Story | **FAQ**

Q: Why are we refining the NFP story?

A: NFP, an Aon company, has a compelling story to tell. The diversity and scale of our business, the integration of our solutions, the expertise and capabilities of our people, and our exceptional culture set us apart in a competitive industry.

But as NFP has grown and evolved, our story has become outdated. It is often told inconsistently across the business and industry awareness of it is low.

That's why we are seizing the opportunity to refine our messaging with the clarity, consistency and resonance essential to building an attractive, differentiated brand that people want to engage with.

By creating a unified, consistent story that can be replicated – among internal and external audiences, throughout business lines, and across geographical regions – we will showcase who we are, what we value and how we make a positive difference for stakeholders.

Q: Who was involved in helping to refine the story?

A: The project is a joint effort between Marketing and Sales led by Eric Boester, Chief Marketing Officer, and Mike James, Chief Sales Officer.

To refine the story, the team conducted interviews with colleagues across the company – business line, sales and corporate leaders – with a focus on:

- How they tell the NFP story to stakeholders
- Where they think the story is being told well
- Where there are opportunities for improvement

After synthesizing the perspectives from these leaders, we developed a variety of components – core tenets, context on our “One NFP” approach, and several iterations of the story to support colleagues as they engage with various audiences in different scenarios.

Q: Has the story been tested with external audiences?

A: Yes. The core tenets that served as the foundation for the story, as well as the standard and extended iterations, were reviewed by a focus group of corporate-level buyers across all business lines and many of our industries.

The focus group was facilitated by Empatix, with members of their team engaging with participants in real time to go deeper on responses and gain additional insights.

The vast majority of feedback was positive across all iterations, giving us confidence that the core of our story resonates with external target audiences and buyers. It also validated that what we believe sets us apart matters to decision-makers. The constructive feedback we received will inform story refinements and our ongoing marketing campaign and strategy.

Q: Is there flexibility in how we tell the story?

A: Absolutely. We understand everyone has their own way of communicating and that the situations in which the story will be told will vary. That's why we're providing colleagues with options as they engage with various audiences in different scenarios.

There are four iterations of the story available for use.

- At-a-Glance – a bulleted list of essential details
- Brief – a brief narrative conveying our scale and capabilities
- Standard – a slightly longer iteration that includes what sets us apart
- Extended – a longer description of our story using our core tenets as the foundation

One story, different lengths, providing flexibility without compromising consistency. The story won't (and shouldn't) be recited verbatim by every NFP colleague, so these options ensure we all share the key points that convey who we are, the value we provide and what's important to us.

Q: Do I need to change how I tell the NFP story?

A: This refined story should resonate closely with how most have been presenting who we are and what we do for clients and prospects but offers the opportunity to tweak or add to your pitches and conversations.

The intention is consistency, accuracy and further alignment that can lead us to better recognition across the marketplace and better outcomes for our clients. We want to be proactive in making sure we continue to lean into our integrated capabilities, as well as our growing scale, to avoid having key audiences say they "didn't know NFP did that" or "had no idea NFP was so big," making our evolution clear in every telling of our story.

Q: Now that we've refined the story, what's next?

A: The refined NFP story will be the foundation of a multi-channel campaign to better articulate who we are, the impact of what we do and the values driving our business. This includes advertising, social media and video. More to come on this and the assets we're developing. In the meantime, feel free to tell the NFP story to clients, prospects and other stakeholders.

Q: Are there other materials I can use to tell the story?

A: We are in the process of reviewing existing materials and updating the story where appropriate. We are also creating new assets, integrating the refined story to amplify conversations and increase overall brand awareness. You will receive updates when these deliverables are available.

Q: Clients and prospects sometimes ask what NFP stands for. How should we answer that?

A: Here's a quick way to answer the question.

NFP was founded in 1999 as National Financial Partners. The company went public in 2003 and in 2013, as part of a go-private transaction with leading private equity firm Madison Dearborn Partners, we rebranded as NFP to reflect the evolution of our company.

If you want to go further, you could also share more about that evolution. Our scope had grown beyond national to become international. Our solutions expanded from financial to include employee benefits and property and casualty, as well as wealth management and retirement. And while we have always valued partnerships, it was easier to just go with a P.

One element of our journey that may be more relevant to some audiences is that as a public company, we established a disciplined approach to corporate governance. And when we went private, we retained this discipline. The ongoing rigor of our accounting, compliance, ethics and financial reporting activities remains and aligns with our commitment to operating the business with transparency and diligence and a respect for all stakeholders.

How much of this you share is completely up to you.

Q: How can we discuss the Aon acquisition when telling the NFP story?

A: Mentioning the Aon acquisition is also up to you and likely depends on your audience and the context of the conversation. It's definitely a significant milestone in our history, but it doesn't change who we are.

If you do mention the Aon deal, here are some approved talking points.

- In April 2024, NFP was acquired by Aon. NFP is now an independent and connected platform within Aon.
- Aon's acquisition of NFP expands their presence in the large and fast-growing middle-market segment, with capabilities across risk, benefits, wealth and retirement plan advisory.
- As an Aon company, NFP has access to Aon's diverse resources and global reach, enhancing our ability to help clients overcome their most significant challenges. This means nothing has changed in terms of how we operate day to day, collaborate with each other and serve clients.

Once the transaction closes, we will revisit these talking points and how the Aon transaction integrates into the NFP story.

If you have questions about discussing the Aon transaction or need additional support, please contact marketing@nfp.com.

Q: Who should we contact with questions about the NFP story?

A: Reach out to Kelly Jones, SVP, Brand, with any questions about the story, feedback on how we can make it better or ideas for telling it more effectively.

Find this one pager and other resources related to the NFP story on Brand Central.