

SITUATION

Kovitz Investment group helps high net worth individuals, entrepreneurs, professionals and Fortune 500 executives manage their financial health by maximizing return while minimizing risk. In 2007 the company realized that the time was right to invest into its most valuable asset, the Kovitz Brand. With this in mind, the senior management asked Ted Pincus, a pioneer developer of the Investor Relations Industry to introduce a new brand vision for the company and bring on the agency to develop the creative work.



KOVITZ INVESTMENT GROUP

Capital Ideas.™





14.8 % ?

YES. THAT'S THE AVERAGE ANNUAL NET RETURN OUR CLIENTS HAVE EARNED OVER THE PAST TEN YEARS, BASED UPON OUR INDEPENDENTLY AUDITED CORE EQUITY COMPOSITE. IT COMPARES WITH THE S&P 500 AVERAGE RETURN OF 8.4% OVER THE SAME PERIOD.

As we reflect on our past 10 years serving high net worth individuals and institutions, and reaching One Billion Dollars under management, we would like to thank our clients. Our greatest sense of gratification stems from the fact that we have been able to convert your trust and patience into long term rewards.



KOVITZ INVESTMENT GROUP

Capital Ideas.

T 312. 334.7300 F 312. 334.7308 222 W. Adams St., Suite 2160, Chicago, IL 60606 www.kig-llc.com

Kovitz Investment Group, LLC®, an investment adviser registered under the Investment Advisors Act of 1940, manages equity, fixed-income, and balanced portfolios for its clients, and has established one all-cap "Core" Equity Composite for all fee-generating equity portfolios for which it has fully discretionary investment decision-making authority. The Composite was established on January 1, 1997. From January 1, 1997 through December 31, 2001, there was no minimum asset size required to be included in the Composite. From January 1, 2002 to the present, the minimum asset size to be included in the Composite was \$100,000 in equity investments. From January 1, 1997 through September 30, 2003 the Composite was comprised of accounts managed at another adviser. KIG began as a separate, legal entity effective October 1, 2003. The persons currently responsible for attaining the performance at KIG have been primarily responsible for achieving the performance throughout the entire period shown. All accounts in the Composite have been managed in a substantially similar manner throughout the entire period. Historical performance results for the Composite include results from portfolios which are closed and no longer part of the Composite. Performance shown is net of the maximum 1.25% annual fee charged to any account in the Composite. Performance returns shown include the impact of dividends, but do not include the reinvestment of dividends into the Composite. KIG compares its Composite returns to the S&P 500 Index, which KIG believes is an appropriate benchmark based on the equities comprising the index. The performance of the S&P 500 does not include deductions for transaction costs, management fees or other fees, and assumes investment of dividends into the index. Net, annual Composite performance from 1997 through 2006 has been audited by an independent third party. Additional information regarding KIG's Composite is available upon request. Past performance is not an indication of, and does not guarantee future results. Securities investments are subject to risk and may lose value.

IMPLEMENTATION

Logo Design: After a long quest for the right character, IIS developed a logo with stylized owl symbol and integrated a tagline – 'Capital Ideas' in emerald green color, which appeals to the client in the financial industry.

Marketing Materials: I Imagine Studio extended the new branding into stationery, a corporate brochure and new print advertising campaign.

RESULTS

The new brand was enthusiastically adopted by the company. Portfolio Managers report that it is now easier for them to present information to their clients having a consistent and unified brand.