



Zeimer's Advertising Shoppe

Gil Zeimer
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Financial Services Copywriting Experience

I have a vast portfolio of financial account expertise. Over the past 25 years, I've produced memorable print and broadcast work, attention-getting promotions, Web site content, plus high-response print and email direct marketing campaigns for many financial institutions.

I'm versatile and prolific. I write dozens of projects a year, so I can handle a large volume of work — including Ads, Radio, TV, Direct Mail, Online Marketing, Sales Presentations, Product Take-Away Sheets, Posters, Tent Cards, Websites, Newsletters, Product Disclosures, Client Conversion Packages, Internal Collateral Materials, and even your Annual Report.

I'm a Direct Marketing expert. For most of my writing career, I've focused on direct response. This includes most of my work with financial and tech clients such as Charles Schwab, Wells Fargo, Intuit, Bank of America, Symantec, Oracle, Palm/3Com, Financial Engines, Accenture and PricewaterhouseCoopers. My highest response rates are 57% for a DMP, and an open rate of 80% for an enewsletter with a 97% click-through.

I turn MarCom into English. The body of work I've written enables me to be well versed in financial terminology. This lets me turn technical copy into layman's copy to appeal to a broad audience, from consumers to financial institutions.

My specific financial account experience includes:

VISA

- **Wrote B2B Turnkey Marketing Program Kit introducing Debit Cards to member banks** for their customers. Promotional/Direct Mail program included solicitation and activation materials: in-branch posters, counter cards, multi-purpose brochures, statement inserts, employee information sheets, prospect and customer letters to customers, overview letter from Visa to bank, and promotion kit.
- Created Blockbuster/Visa tie-in DMP with tiered consumer gift card program for using the Visa Debit Card.

Wells Fargo

- For 360 Group, San Rafael, I wrote a project that launched an in-branch promotion for Business Gateway. It included ease-backed counter cards, take-one brochures, in-branch posters and follow-up direct response letters for a referral program for its "Refer a Colleague" on-line checking services.
- I wrote a series of direct response letters to [Equity Line Platinum Card owners](#) with a promotional overlay from Home Depot with Damore Johan.
- From 2008-09, I wrote a series of more than 20 direct mail projects for one of Wells Fargo's contracted ad agencies for Home Equity Lines of Credit.
- I also worked for Wells Fargo for several years during college.



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Intuit

- Wrote [the QuickBooks introductory Direct Marketing Package](#) aimed at upgrading Quicken customers. Rather than cannibalizing the Quicken brand, this package showed potential users why they should use QuickBooks, and why they shouldn't.
- Created the 12-page Intuit Checks, Forms and Supplies catalog of products with Landis Designs. Through extensive focus group research, we determined the right message and cover visuals that would appeal to the widest audience.
- Edited a 77-page Web site [for IntuitMarket.com/quickbooks](http://for.IntuitMarket.com/quickbooks)
- Wrote QuickBooks New User Kit and six other projects during 2006, including a [32-page QuickBooks Catalog](#) for Checks, Envelopes, Supplies and More. I can show you PDFs or hard copies of either of these.
- Scripted over 125 blog articles for the [Intuit Small Business Blog](#) over 14 months.
- Created the original 275 definitions for the [Intuit Small Business Dictionary](#).

Charles Schwab

- Created six versions of letter and two versions of brochure for Schwab Stock Screener DMP through Landis Designs, San Francisco.
- Created a solicitation direct mail and all supporting materials (brochures, sign-up forms, letters) for Schwab's OneSource International Portfolio – a fund of mutual funds.
- Wrote consumer materials to introduce Schwab's program of Variable Annuities.
- Scripted B2B email/Web landing page for Schwab Mortgage Center through E-Loan.

Bank of America

- As Associate Creative Director at Grey Advertising, SF, I wrote :60 and :30 TV scripts that won the \$6 million corporate banking division for the agency.
- I wrote a campaign of three newspaper ads for [BofA's Home Loan Center's division](#) that were so successful, they had to be pulled after two weeks instead of after the proposed six-week run.
- I wrote, directed and produced a [:60 radio commercial](#) that showcased how fast the BofA Home Loan process had become.
- Through Lot 21 Interactive Agency, I composed [NationsBank online banners](#) for their Platinum Card. View them by scrolling to the bottom of the link above.
- Through Cohn & Wells, I drafted a DMP with 17 cells and six million pieces of mail to introduce the Sunoco MasterCard to current and future BankAmericard customers (budget was approximately \$1 million).

Accenture.com Financial Services

- Wrote/edited copy for each of the four key sections' home pages (Banking, Capital Markets, Insurance and Health Services), plus each section's seven vertical industry articles. A colleague did the rest — animation, graphics, and XML.



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PricewaterhouseCoopers Security & Privacy Solutions

- For three years, I was the Webmaster/lead writer/editor for PwC's Security & Privacy site. I wrote hundreds of pages of site content, White Paper overviews, case studies, and delivered 32 issues of a monthly online newsletter during 2002 through 2004. This led to managing six other divisions' websites and newsletters: Internal Audit, Data Management, Project Advisory Services, Sustainable Solutions, IT Business Relationship Management and Governance, Risk & Compliance.

Barclays Global Investors

- Through the 360 Group in San Rafael, I created a [three-dimensional direct response lead generation piece](#) aimed at HR Directors and in-house money managers. Using the headline "401(k) spoken here" and offering a two-way radio, this piece gained BGI millions of dollars in deposits. This campaign garnered a 20% response rate.

Irwin Financial Corporation/Premier Equity

- For this major East Bay-based company, I wrote a series of four Home Equity Loan direct mail packages. They included a "Credit Card Challenge".

Sanwa Bank California

- I wrote in-branch counter cards, take-one brochures, teller buttons, Duratrans posters, newspaper ads and direct mail targeted to Sanwa savings customers to promote the purchase of IRAs and CDs.

Household Credit Services

- Created direct mail packages for MasterCard credit card offerings, credit line increases, Balance Transfer offerings, Convenience Check offerings.

First Hawaiian Bank

- Wrote one DMP for home equity loans and another for personal equity loans for this Honolulu-based bank.



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Other financial clients with whom I've worked include:

- American Savings (in-branch promotions)
- Bayview Bank (radio spots)
- Barbary Coast National Bank (ads, newsletters, DMP, outdoor)
- Barron Mortgage Company (radio spots and newspaper ads – [download the radio commercial](#))
- Farm Credit Bank Association (B2C ad campaign, sales video)
- First Texas Savings (ads, TV, radio)
- Freedom Debt Relief ([TV commercial](#))
- Yodlee (data sheets for DirectPay, Account Verification, Account Opening, and Advisor, plus edits to a Yodlee White Paper).