

PERSONAL FINANCE

QuickStart Guide

The Simplified Beginner's Guide to
Eliminating Financial Stress, Building Wealth,
and Achieving Financial Freedom

MEDIA KIT



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Don't Let Money Rule Your Life – Taking Back Power Is Easier Than Ever

New author, podcaster, and CFP® Morgen Rochard has some uncommonly helpful advice for the common money problems we all face.

Available 10/19/2020

Albany, NY – ClydeBank Media is proud to announce the release of their newest personal finance title, *Personal Finance QuickStart Guide* [978-1-945051-01-2, \$24.99] from debut author, podcaster, and CERTIFIED FINANCIAL PLANNER™ Morgen Rochard. Rochard is not only an experienced CFP® but is also the founder and principal of Origin Wealth Advisors, a financial planning consultancy built on a passion for helping young families and professionals align their finances with their life goals. Morgen's new book is the culmination of her experience distilled into a helpful guide brimming with uncommon advice for the common money issues we all face.

"Financial independence is only achieved by having a plan and being disciplined about sticking to it," says Morgen about her new release. "This book isn't just a passion project or labor of love—though it is both of those—it is also a helpful and actionable guide for anyone who wants to build wealth and create financial independence for themselves or their families."

At a time when more people than ever are feeling a financial squeeze, a clear and concise road map to building financial independence is more important than ever. Written in terms that readers of all financial literacy levels can understand, *Personal Finance QuickStart Guide* is filled with personal stories told in Morgen's straightforward and candid style that illustrate her expert advice.

Personal Finance QuickStart Guide is living proof that personal finance fundamentals aren't the complex boogeyman some would make them out to be

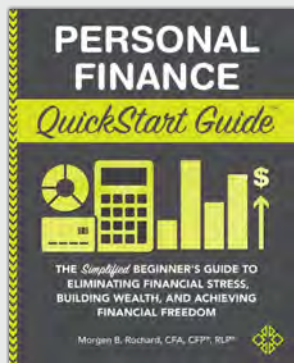
About the Author

Morgen B. Rochard, CFP®, CFA, RLP® is a financial advisor, author, podcaster, and founder of Origin Wealth Advisors LLC, a financial advisement firm. At Origin, Morgen focuses on driving personal connections and getting to the root of the financial success of her clients. Before striking out on her own, Morgen worked extensively with such notable financial heavyweights as UBS Financial Services and Merrill Lynch. Connect with Morgen at www.originwa.com and find her insight at the Money Owners podcast on iTunes.

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The Simplified Beginner's Guide to
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and Achieving Financial Freedom

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ABOUT THE BOOK:

At a time when so many people feel like money rules their lives, take back control and empower yourself to build the secure financial future you deserve. Personal finance fundamentals aren't the complex boogeyman some would make them out to be, but many people still find financial success elusive. This book changes that.

As a CERTIFIED FINANCIAL PLANNER™, author, podcaster, and financial advisor, Morgen Rochard CFA, CFP®, RLP® knows what it takes to reach your financial goals, whatever they may be. In *Personal Finance QuickStart Guide*, Morgen has distilled a career's worth of experience in the financial world into an uncommonly helpful guide to the common money problems we all face. Filled with personal stories told in Morgen's straightforward and candid style, this book is the missing ingredient for anyone who wants to take control of their finances and live their most fulfilled life.

ABOUT THE AUTHOR:

MORGEN B. ROCHARD, CFA, CFP®, RLP®, is a financial advisor, author, podcaster, and founder of Origin Wealth Advisors LLC, a financial advisement firm. At Origin, Morgen focuses on driving personal connections and getting to the root of the financial success of her clients. Before striking out on her own, Morgen worked extensively with such notable financial heavyweights as UBS Financial Services and Merrill Lynch. Connect with Morgen at www.originwa.com and find her insight at the Money Owners podcast on iTunes.

ADVERTISING & MARKETING:

- Amazon Advertising
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- Goodreads Advertising
- Shelf Awareness Advertising
- BookBub Advertising (Featured Deal, Email Ads)
- Advance Review Copy Distribution (Edelweiss, LibraryThing, Goodreads, Amazon)
- National Library Outreach
- Series of blog posts amplified via clydebankmedia.com and guest posts on relevant high-traffic blogs

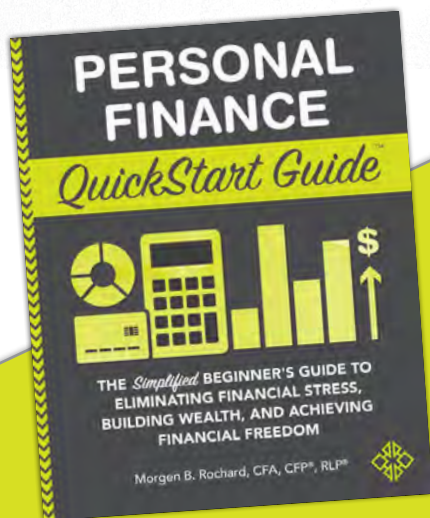
MORGEN B. ROCHARD, CFA, CFP®, RLP®

A LEADING AUTHORITY ON PERSONAL FINANCE & FINANCIAL PLANNING

MORGEN B. ROCHARD, CFA, CFP®, RLP®, is a financial advisor, author, podcaster, and founder of Origin Wealth Advisors LLC, a financial advisement firm. At Origin, Morgen focuses on driving personal connections and getting to the root of the financial success of her clients. This is a natural extension of her mission to help others live their most fulfilled, financially stress-free lives.



Morgen's approach is designed to help her clients find peace of mind with all aspects of their situation—financial and beyond. As a Registered Life Planner® her role is to help others truly live their passion. This framework helps clients explore what is most important to them, dive deeper into what they want to prioritize, and remove any obstacles that may get in their way.



MORGEN B. ROCHARD, CFA, CFP®, RLP®, in addition to authoring *Personal Finance QuickStart Guide: The Simplified Beginner's Guide to Eliminating Financial Stress, Building Wealth, and Achieving Financial Freedom*, is also the **founder of the Money Owners Podcast on iTunes and of Origin Wealth Advisors LLC:** www.originwa.com

EXPERIENCE:

- Morgen worked extensively with such notable financial heavyweights as UBS Financial Services and Merrill Lynch.
- She founded Origin Wealth Advisors LLC where she provides real advice to real people who want to get serious about their financial future.
- She developed the Money Owners Podcast where you will find discussions about various personal finance topics.



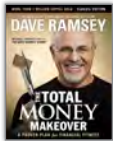
ADVERTISING & MARKETING PLAN



TARGET MARKETS:

- » **General Trade Market:**
 - Individuals interested in personal finance
 - Individuals interested in budgeting and money management
 - Individuals interested in investing
- » **Academic Market:**
 - Undergraduate classes in personal finance
- » **Additional Markets:**
 - Domestic and international libraries
 - Domestic and international bookstores
 - Trading and investing training programs and seminars

COMP TITLES:



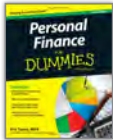
The Total Money Makeover:

Classic Edition: A Proven Plan for Financial Fitness

Author: Dave Ramsey | **Publisher:** Thomas Nelson

ISBN-13: 978-1595555274 | **Publish Date:** September 17, 2013

Format: Hardcover | **Price:** \$26.99

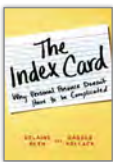


Personal Finance for Dummies

Author: Eric Tyson, MBA | **Publisher:** For Dummies (Wiley)

ISBN-13: 978-1119517894 | **Publish Date:** November 13, 2018

Format: Paperback | **Price:** \$24.99



The Index Card:

Why Personal Finance Doesn't Have to Be Complicated

Author: Helaine Olen, Harold Pollack | **Publisher:** Portfolio

ISBN-13: 978-0143130529 | **Publish Date:** March 7, 2017

Format: Paperback | **Price:** \$14.00



The Latte Factor:

You Don't Have to Be Rich to Live Rich

Author: David Bach, John David Mann | **Publisher:** Atria Books

ISBN-13: 978-1982131937 | **Publish Date:** May 7, 2019

Format: Paperback | **Price:** \$18.00

» **Differentiated From Competition:**

- *Personal Finance QuickStart Guide* is the most beginner-friendly, comprehensive, up-to-date and widely accessible title on personal finance.
- *Personal Finance QuickStart Guide* is the most simplified presentation of the material on the market. No unnecessary fluff is included to distract or confuse readers.
- The author, Morgen B. Rochard, CFA, CFP®, RLP®, is a qualified expert and has worked with countless clients to help them gain control of their finances and invest their wealth wisely.
- The title will be supplemented with multiple free online digital resources.

SALES:

» **Sales Goal:**

- ClydeBank Media's sales goal for the first 12 months after publication is 10,000 units.

» **Sales Team:**

- ClydeBank Media's sales force is composed of an internal team that has extensive experience and background in digital marketing, retail sales and B2B sales.

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- Goodreads Giveaway
- Amazon Giveaway
- Edelweiss+ Digital Review Copies
- ClydeBank Media Advance Review Copy List (1,000+)

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- School Library Journal ad
- Library Journal ad
- Foreword Reviews
- IBPA Media Outreach

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- Display at the American Library Association (ALA) Annual Conference

» **Bookstore Outreach:**

- Domestic and international bookstore outreach campaign via email, phone, and mail to over 900 bookstores
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- Shelf Awareness advertising
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- BookBub (Featured Deal, Partners email ads)
- Groupon promotion
- Email marketing to ClydeBank Media list (13,000+ subscribers)
- Series of blog posts promoting title (10+ posts)

ABOUT CLYDEBANK MEDIA

WHO WE ARE

ClydeBank Media is a multimedia publishing company meeting the demand of beginners everywhere with our unique QuickStart Guides: simplified learning content that is available when and where readers need it. This allows our customers to learn on their own schedule, in their own time, and in their own way.

We believe that access to the right information is the key to success. That's why we're committed to providing high-quality, easily understandable, reliable information to our customers through the web, print books, e-books, and audiobooks.

ClydeBank Media is – *Your World. Simplified.*



OUR LOCATION

Our team of dedicated researchers, writers, editors, and designers is based in Albany, New York.



OUR MISSION

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