



Vanguard Legal Group is a leading estate planning firm in California, and we're dedicated to providing our clients with exceptional legal service and peace of mind. A helpful definition of **estate planning** is:

"the preparation of tasks that manage an individual's financial situation in the event of their incapacitation or death."

We help individuals and families plan for their future, ensuring their wishes are carried out and their loved ones and assets are protected.

We solely provide estate planning services, which range from Trust Development and Trust Administration to Fiduciary Services. Unlike other firms in our market, we do not provide services in areas of law outside of estate planning.

Our Need

Our website is our digital home base. We need it to **be attractive and we need it to organize information in a manner that best serves a variety of audiences and supports our future SEO ambitions**. Our work to protect our clients is excellent and our website should reflect that.

Currently, it is substandard aesthetically and functionally.

Our current website *does* allow us to facilitate key lead generation and consideration actions such as:

- Workshop sign-ups
- Hotline calls
- Contact form completions
- Visitor review of services-related pages
- Visitor review of content-marketing pages

However, we need our new website to **encourage and optimize** the facilitation of these critical actions and potential new ones, including:

- Reviews generated
- Appointment scheduled
- Checklists completed

This RFP seeks a qualified front-end designer or design agency to design a user-friendly and visually appealing website that strengthens our brand and enhances the experience for visitors.

Vanguard Legal Group, PC
RFP - WordPress Website Design

This is a WordPress-specific, front-end-ONLY design RFP that does NOT include:

- **Text content development (you may use placeholder text - more below)**
- **Website development (this will be a separate RFP)**

Our new website will:

- Leverage WordPress CMS.
- Be attractive.
- Project a professional and trustworthy image.
- Provide a user-friendly experience for our visitors, making it easy for them to navigate, find needed information, and take critical actions.
- Showcase our expertise in estate planning and outline the process of working with Vanguard Legal Group.
- Be responsive and optimized for all devices (desktop, tablet, mobile) to ensure a seamless platform experience.
- House a variety of content marketing assets (short-form content, such as blog posts, in addition to longer-form and gated content)

We are excited to partner with a talented designer or team who can bring our vision to life and create an attractive, organized, and effective website showcasing our best-in-class services, capturing leads, and, ultimately, helping drive client acquisitions.

You will deliver all design assets to us for development and we want this project to be completed within 6-8 weeks.

Note: A non-disclosure agreement (NDA) will be required before receiving any company or project information we deem confidential.

Our Target Audiences

We exclusively service residents within the state of California.

Key demographics include:

- Homeowners in California without trusts
- Adults ages 55-70 (large percentage of our client base)
- Middle-aged adults
- Mid to high-net-worth individuals

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Brand Identity

Vanguard Legal Group does not currently have a style guide, but this project presents an exciting opportunity to help us develop a solid and impactful brand identity through website design.

We'd like hex color #004E81 to be a key component within our new website.

Website Content

We DO NOT require text/copy development as part of this project. Vanguard Legal Group will provide existing website content to our chosen designer for integration into the new website design where appropriate.

You may need placeholder copy for some design mockups, so please advise us on your typical approach to handling placeholder copy.

We will also want images (professional stock photos) and icon recommendations.

Pages Needing Design/Redesign Include:

1. Homepage.
2. About Us.
3. Our Team.
 - This page will highlight various groups of staff ranging from operations to attorneys.
 - We need our staff to be showcased within groups on this page.
4. Our Services.
5. Template - Individual services.
 - We will use this template to create individual pages for all Vanguard services.
6. Upcoming Workshops.
 - This page will showcase forthcoming workshops.
7. Template - Individual upcoming workshops.
 - We will use this template to create individual pages for all upcoming workshops.
8. Content aggregation page/blog page
 - This page will organize all of our available content.
9. Template - Short-form content/blog post
 - We will use this template for our blog posts.
 - We plan to leverage text-based content mainly but will occasionally leverage video.
 - You may advise whether we should leverage one text-based and video content template or two separate templates for both types.
10. Template - Landing page for gated content.
11. Template - Follow-up page for gated content.
12. Educational content page.

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- This page will be a gateway to FAQs, blog pages, video series, and potentially more.
- 13. Contact Us.
- 14. Office locations page.
 - This page will list all 50+ office locations.
- 15. Template - Individual office locations.
 - To be used for each location.
- 16. Template - Thank-you/Confirmation page.

Website Development

This RFP is specifically for website design, with website development subject to a separate, subsequent RFP.

We are currently deciding how our upcoming website will be developed—whether it will be mainly developed via a website builder, such as Elementor, or primarily custom-coded.

Project Deliverables

- High-fidelity mockups of all pages/templates/menus (desktop, mobile & tablet versions)
- All graphic assets (stock photos, icons, logos)
- Style guide (color palette, typography, spacing, other visual guidelines)

Proposal Deliverables

Please include the following within your proposal

- A detailed 6 to 8-week project timeline detailing check-in meetings and project milestones.
- A proposed revisions process.
- Budget - We are requesting proposals with estimated costs provided by you based on the scope of work.
- Note - We will give special consideration to partners who can complete this project in 6 weeks.

Selection Process

We are looking for a design partner who can develop an excellent design strategy using this RFP as a guide. We are not the design experts - you need to be. However, there needs to be an appropriate degree of collaboration and transparency between all parties.

We need to understand your process, from project start to asset delivery, and how you believe you can help us achieve our desired result.

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Please show us the great work you've done to date (portfolio, design samples) and find a way to show us that you are the strategic partner we are looking for to help drive this project and, potentially, future projects.

We are a great team looking for a great partner.

We want to start this project no later than Friday, June 14th and will receive and review proposals **immediately** without specified "submission" and "review" timeframes. We strongly encourage you to respond excellently and with urgency.

Contact Information

Please submit all proposals to:

Daniel Johnson
Manager, Marketing & Administration
Vanguard Legal Group, PC
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