

2016 Media Briefing for Top Performing Mutual Funds

Wednesday, May 25, 2016



sunstarstrategic.com



Location

TBD
New York City

Participation Fee

\$9,400

(\$8,900 for
MFEA members)

Deadlines

Registration Form:
April 8, 2016

Handouts:
April 25, 2016

More Info

Dan Sondhelm
703.299.8390

Be one of a handful of fund managers to tell your story, including your strategy, your portfolio and your market outlook, to journalists at the most influential publications.

BENEFITS

- Build and develop relationships with financial media
- Earn press coverage to add credibility and third-party endorsements

SunStar Strategic Media Briefings assemble both well-known and undiscovered investment managers across a wide range of asset classes, sectors and management styles. Participants can look forward to presenting to members of the intermediary, institutional, retail, and trade press from recognized publications such as Associated Press, Barron's, Bloomberg BusinessWeek, CNNMoney, Dow Jones News, Financial Advisor, Financial Planning, Forbes, Fortune, Institutional Investor, Investment Advisor, Investment News, Marketwatch.com, Money, Newsday, REP, Smart Money, Standard & Poor's, The New York Post, TheStreet.com, The Wall Street Journal, Thomson Reuters, and more.

SunStar Strategic is a leading public relations and marketing consulting firm that works with mutual fund companies to attract assets and build brands through smart marketing.

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Registration Information

Your Registration is required by April 8, 2016 with background info.

Handouts are due by April 25, 2016.

Thank you for your interest. Please read the following and scan and email your completed form to: Dan Sondhelm, dsondhelm@sunstarstrategic.com or call 703.894.1046 with any questions.

1. PARTICIPATION FEE: \$9,400 for two admissions, \$1,000 per additional firm representative, includes

- Before the briefing
 - Presentation coaching
 - Promotion of your participation in the event to approximately 500 financial journalists, which may also result in additional interviews before the event
 - Networking dinner the evening before the event
- Day of briefing
 - Admission for your fund manager and one additional company representative
 - Six-minute presentation*
 - Networking opportunities with reporters prior to and immediately following the presentations
 - Participation in a Q&A session following the last presentation
 - Brunch
- Following the event
 - Contact information of reporters who attended
 - Tips on how to maximize the results of the event
 - Coordination of reporter interview requests following the event
- Optional services at additional fees
 - Media & presentation training to ensure your portfolio manager is at his/her best when speaking in front of groups or on national TV

2. PAYMENT: SunStar will invoice you upon Registration

3. PRESENTATION COACHING CALL: We will schedule a 15-minute “coaching call” with your presenter. The purpose of this call is to:

- Answer any questions he or she may have about the press briefing
- Gather your thoughts on the portfolio and the market so that we can include them in documents that we will be preparing and distributing to journalists in advance of the event
- Brainstorm about newsworthy ideas that may get attention by reporters

Please confirm when we may conduct this interview.

4. Registration FORM - DUE BY April 8, 2016: Please complete and return this form.

	Primary Contact	Fund Manager	Additional Executive (if different from Primary Contact or Fund Manager)
Name			
Firm Name (as it should appear on name tag and in documents)			
Fund Name & Ticker			
Executive Names (as they should appear on name tag and in documents)			
Titles (as they should appear on name tag and in documents)			
Street City, State, Zip			
Email			
Telephone			
Website			
Title of Presentation			
Will you be joining us for dinner the night prior to the event?			
Preferred date/time for presentation coaching call			

ADDITIONAL REQUIRED INFORMATION Please include this information with the above form no later than April 8, 2016 to be used in our promotional efforts

- A. Investment Process: Short description on the portfolio manager's investment process for the fund
- B. Market Outlook: The portfolio manager's thoughts on the market or themes found in the portfolio
- C. Stock Picks: Three securities in the portfolio, and bullets regarding why you like them
- D. Biography of Presenter: Brief biography of the presenter
- E. Photo of Presenter: High resolution jpg files preferred
- F. Firm Logo: High resolution jpg/eps files preferred

*** HANDOUTS - DUE APRIL 25, 2016 in SunStar Strategic's Office**

Due to time limitations, we will not be using PowerPoint presentations. Handouts are encouraged. Please send 75 copies (including marketing materials, background information, presentation slides, etc.) to our office, SunStar Strategic, Attn: Sue Bryant, 211 N. Union Street, Suite 240, Alexandria, VA 22314.