



SunStar

FUNDFACTOR

Story Development Media Training Positive News Coverage Reprint Distribution

'Tis the Season when Money is in Motion

It's been a crazy year for fund managers and marketers! So much so, that the economy could use a little – make that a lot – of holiday magic right now.

Surely 2008 will go down in the history books as a year when Americans learned more about politics and the economy than our educational system could have ever imagined. With all this attention on the daily gyrations of Wall Street, there couldn't be a better time to tell your story.



Dan Sondhelm

Year end is traditionally a time when investors reevaluate their portfolios, assess their tax situation and plan for retirement contributions. As 2008 draws to a close, more than ever investors will choose one firm's funds over another as they try to protect their portfolios from further losses. Some are looking for more conservative options while others are seeking greater diversification through non-correlating asset classes. Bargain shoppers are taking advantage of attractive equity prices. Still others are selling off losers to offset taxable gains.

Which funds will be the new winners?

Here are five tips for staying in front of investors during this busy time of year.

Everybody Loves a Sale.

Customers fight to be first in line at the door at Wal-Mart to save 30 percent on a plasma television set. Your fund has high quality companies at screaming values down 50 percent - but no one is buying. Position the value of your fund by choosing three stocks and aggressively communicating their stories to your investors and to the media. Explain how they make money and why they are undervalued.

Tell the Story of the Spirit of Economy Past, Economy Present and Economy Future.

Paint a picture for shareholders with your end of year report. Charles Dickens's ghosts set the stage for the future by first reminding Ebenezer Scrooge about the past. You, too, can instill hope and underscore your expertise by giving examples and showing graphs of past economic downturns and time to recovery. Use easy-to-understand language or better yet, pictures and videos, and put them on your Web site.

Should Auld Acquaintance be Forgotten?

Change for change sake can be a dangerous game. This is a particularly important time to remind your clients why they are in your funds. Emphasize your process and philosophy, reiterating the long-term benefits of being in the

market. Stress the resilient nature of the US and world economies. Even though most of us believe things will get worse before they get better, industry experts trust that a recovery will occur. Give your investors hope by sharing your insights.

Go to the Parties.

The needs of the financial press don't slow down over the holidays. Reporters are still clamoring for comments and stories to fill Web pages, magazines and daily news. Making yourself available will not only offer you press coverage over the holidays, it can foster a relationship with a journalist and pave the way for ongoing press in the future as well. Let the publications you've targeted know you are available for comment.

Make Your New Year Resolutions.

With 2009 upon us in the blink of an eye, this is the time to assess what worked or didn't work in your sales and marketing efforts this year. As you pen next year's objectives, consider whether your focus is trying to establish your brand, build recognition, grow or retain assets or open new distribution channels. Create specific objectives for your sales and marketing programs and put in a mechanism to hold your team and yourself accountable. Be sure to take a hard look at the consistency of your messaging and the commitment of management to a robust effort.

Thank you to all our clients and friends in the press.

From all of us at SunStar, thank you for working with us during 2008. We wish each of you the joys of the season, good health and prosperity!

Call us at 703-894-1046 to discuss how SunStar can help you achieve recognition in this competitive environment.



SunStar: One of Inc. Magazine's 5,000 fastest growing private companies in America in 2007 and 2008.

SunStar works with retail and institutional investment managers and mutual fund firms to attract investors, strengthen distribution and build brands through structured news generation programs and smart marketing. We know the industry and the reporters who cover it. We also understand the often challenging legal, regulatory and compliance issues facing clients.

Find more about smart marketing and successful public relations campaigns in our blog: FundFactor.net