



SunStar FUNDFACTOR

Story Development Media Training Positive News Coverage Reprint Distribution

We will get through this.

“These are the times that try men’s souls.” These opening words from Thomas Paine’s 1776 discourse don’t speak to current or past economic crises, but for most investors and fund managers, they ring clear and true. Perhaps less often quoted are the words that follow later, “‘Tis surprising to see how rapidly a panic will sometimes run through a country. All nations and ages have been subject to them.”

As financial professionals, we are significantly more in-tune with the cyclical nature of the markets and the long-term corrections that have occurred throughout history. There is no doubt that this episode will go down in the history books as one of epic proportion. It is our responsibility to provide insight and reassurance to our shareholders, those individuals who have placed their trust in our expertise.

History on our side.



Dan Sondhelm

Sophisticated investors and professional money managers know this. They have confidence and history on their side. With that said, this is a test of fire where long hours and nerves of steel are not optional. In the midst of the firestorm in your own portfolios, reaching out to investors is essential. “It’s both an opportunity and a responsibility to be a voice of calm and reason. Investors of all sizes are hungry for sound advice,” says Melissa Murphy, account manager at SunStar. “Investors and their financial advisors are grasping at advice and guidance. Who better to provide it than their fund manager?”

Being present in the press during volatile times is critical to stemming redemptions. We understand that it’s a tough balancing act with what seems to be a new crisis around every corner, but visibility now can have a huge payback. For your fund firm, talking with your target publications and reporters during this time yields a dual benefit. “Shareholders are reassured when they see their fund manager display a steady and firm hand at the helm. Additionally, reporters will positively remember those managers who took the time to talk during frenetic volatile times such as these,” says Robert Tebeleff, account manager at SunStar.

What more can be said?

Amiee Watts and Omar Hafez, account managers at SunStar, offer these guiding principles:

- **Stay in control.** If you haven’t already, establish a crisis management plan so you can stay ahead of the story and control your message.
- **Be consistent.** Your key messages and advice to investors shouldn’t change based on what’s happening in the markets on a day-to-day basis. Emphasize your long-term views and the strengths of your process.

- **Communicate internally.** Ensure that your entire staff, from the research team through the receptionist, understands your position. It may not be “business as usual,” but a sense of calm and control throughout the organization will go a long way to quelling investor and employee concerns.
- **Make it easy for yourself.** Establish a “press room” or “communications center” on your Web site so that reporters and investors can get timely updates.
- **Reassure.** Say it once, then say it again and again. Use your Web site, your commentaries and your interviews to get the word out. Investors are looking to be reassured that their fund managers are not panicking.
- **Show respect and empathy.** Investors will appreciate that you acknowledge their fears. Remember your shareholders are nearing retirement or dreaming of first homes and college educations for their children. Don’t sugar-coat your message, rather, provide as much information as you can that is meaningful. Use plain English and cite examples to aid comprehension
- **Be on the front line.** Monitor the media and prepare three or four points that describe how the crisis is affecting your firm and the steps you are taking to minimize its impact. Get in front of the media as often as possible.
- **Seize the opportunity.** More investors than ever before are paying attention. This is an incredible opportunity to educate investors that volatility creates great opportunities.

It ain’t over till it’s over, and we’ve got a long road ahead.

Damage control to investor confidence in the markets overall is paramount to future asset gathering. At SunStar, we work with our clients to put together strong messages that answer the short-term questions, coaching them prior to reporter interviews. We help focus your approach and provide insight about specific journalists and publications.

Call us at 703-894-1046 to discuss how SunStar can help you generate positive news now as part of a long-term public relations program.



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