



SunStar FUNDFACTOR

Story Development Media Training Positive News Coverage Reprint Distribution

Smaller Fund? Get Discovered.

So, you have a top performing fund. Unfortunately, you are frustrated because you aren't getting the attention and recognition you deserve from investors and advisors. And, your fund is smaller than you want it to be along with your firm's revenues.

"That will change," you think to yourself, "as soon as we get discovered."



Dan Sondhelm

Some funds, with a bit of luck, do get discovered. But most struggle for assets in this competitive marketplace because of beliefs such as:

- "I'm too small to get noticed."
- "I'm a separate account manager. Our fund is only for smaller accounts for our larger clients."
- "I don't do marketing."
- "I can't afford a wholesaler."

Despite being hidden gems, smaller funds with these beliefs tend to stay small or eventually get out of the business. The alternative is to commit to growing your fund. Then leverage the fund's public track record to also grow your separate account business.

Platforms are Just a Start.

Just because you've been accepted on a platform doesn't guarantee assets will follow. Successful distribution lies in ensuring those advisors know you, know your people and know your products. But not all firms can afford a wholesaler (or twelve) or the time on the road to work and support your financial advisors.

Virtual wholesaling can be an excellent way for smaller firms to develop stronger distribution to compete with the larger players. This alternative method to traditional wholesaling can also help larger firms scale back their spending while still getting results.

In general, virtual wholesaling requires fund sales professionals to use technology to communicate with advisors in a structured and timely way to attract and retain investors, while building brands. Let's take a look at the components:

Mother Goose Knows Best.

Did you have a favorite book when you were a child - one that you could easily recite by heart? In order for advisors to really get to know you better, you need to tell a solid story, consistently.

That story includes information about your corporate history and funds. It articulates your key themes, sector strategy and top stock selections. At its core is your investment process. Perhaps most importantly, it is a living story -- one that grows and adapts as the markets twist and turn. It let's investors know about the good decisions you've made and the current positioning of your fund. Once you've developed your story, keep it fresh and ensure that everyone in your firm can tell it without hesitation.

Nine Out of Ten Experts Agree.

Admit it. You're more likely to buy a specific brand of product if a professional or celebrity endorses it. The same goes for investment firms. Third-party endorsed news coverage in national and local business publications adds credibility that can't be bought.

Positive, frequent media coverage can often be the silver bullet in your marketing effort. Earning such recognition on a regular basis attracts advisors and investors, strengthens distribution, and builds your brand at a fraction of the cost of most other marketing efforts. Consistently tell your story to top journalists in order to build relationships and earn continued press coverage.

Spinning the World Wide Web.

Your Web site is not just a place on the Internet where you cut-and-paste the text from your prospectus. Instead, it is a place for you to tell your story and keep your clients and prospects coming back. There are some simple ways to enhance your existing web site to ensure your content is fresh and rich.

- **Add a Press Room** that features media reprints and other information so reporters can get the information they need quickly; Showcase your latest press coverage on your Home Page to add immediate authority.
- **Post and archive your market and portfolio commentary**, quarterly at a minimum, monthly, weekly or daily as the market warrants; Post the latest commentary on your Home Page.
- **Integrate your fund site** with your corporate site to provide timely information and minimize compliance/ FINRA review delays.

Providing such information in easily accessible ways helps advisors and prospects learn more about you and how you think quickly and efficiently.

Communication is Key.

Regular communication with advisors is critical in order to keep your story top of mind. Consistently offering timely and meaningful information will position you in their minds as the expert on certain topics.

Host Webinars or conference calls for advisors on a quarterly basis.

Use monthly email newsletters to drive advisors to new content and fresh ideas on your Web site such as recent commentaries, Webinar promotions and media coverage.

Take advantage of platform outreach programs to stay in front of their advisors; many of these are free.

A healthy relationship is based largely on open communication. Building strong relationships where advisors trust and respect your firm requires proactive communications.

SunStar's comprehensive DistributionNOW program is designed to provide you with a virtual marketing staff or complement your personnel to help you more effectively execute your program.

Let's discuss how SunStar can help you grow in this competitive environment. Call us at 703.894.1046 or visit www.isunstar.com.



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