



HELPING FINANCIAL  
SERVICES COMPANIES

- ATTRACT INVESTORS
- STRENGTHEN DISTRIBUTION
- BUILD BRANDS

## ENERGIZE YOUR GROWTH

Competition in the financial services market place is fierce. With more than 10,000 mutual funds and other investment products vying for the attention of financial professionals and the investing public, how can you tell your story and stand out from the crowd?

Attracting new assets and keeping the ones you have requires a strategic approach, one that sets you apart and gets you the recognition you deserve.

For more than two decades, SunStar Strategic has been dedicated to helping mutual fund managers gain the recognition they deserve from the press, investment professionals and investors. We start by helping you articulate the story unique to your firm and plan a distribution strategy that fits your firm's goals, personality and budget.

### Strategy. Execution. Accountability.

It takes an intelligent, comprehensive and consistent approach to make your distribution effort successful. Whether you're about to launch your first fund, are an undiscovered gem or have an established fund family that needs to strengthen distribution, talk with SunStar Strategic. We provide guidance and collaboration working with your marketing and sales staff or as your marketing partner.



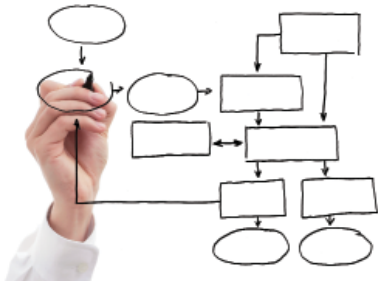
### STRATEGIC CONSULTING

Set a strategic approach to enhance distribution and reach your growth goal

- Decision-making support prior to launch or to enhance distribution
- Advice for targeting the right channels, platforms and audiences
- Consultation regarding expense ratios, share classes and sales loads
- Road map for gaining recognition and attention
- Proactive marketing ideas

### ANNUAL CLIENT CONFERENCE

Opportunities to talk with your peers and share your insights and challenges about succeeding



### MESSAGE DEVELOPMENT

Create a unique, consistent story to use across all communications

### MEDIA/COMMUNICATIONS TRAINING

Learn how to make the most of every opportunity to tell your story

- Sessions on dealing with the press and other audiences
- Practice staying focused on delivering your message
- On-camera exercises

### REPUTATION MANAGEMENT

Proactively address challenging concerns

- Defuse past issues
- Respond quickly during a crisis
- Educate and address investors' fears



### POSITIVE NEWS COVERAGE

Establish credibility as a thought leader

- Deliver your message through popular media such as *The Wall Street Journal*, *New York Times*, *Investment News*, *CNBC*, *Bloomberg* and more
- Interview by phone and in person via media tours and media briefings
- Ongoing interview preparation, coaching and feedback

### REPRINT MANAGEMENT

Repurpose third-party endorsed press coverage for website, email marketing and conferences

- Obtain publication permissions
- Navigate compliance process



### DIGITAL MARKETING

Leverage technology to communicate with clients and prospects efficiently

- Email marketing
- Webinars
- Websites
- Social media
- Video production

### MARKETING COMMUNICATIONS

Create materials that support your sales process

- Brand identity/logo
- Brochures, fact sheets, pitch books, white papers
- Conference/trade show booth design and support

## STAND OUT FROM THE CROWD

We welcome an opportunity to learn more about your firm and goals.



Contact Dan Sondhelm, SVP, partner  
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## INDUSTRY EXPERTISE

At SunStar Strategic, we understand your business. We are specialists in helping financial firms and mutual funds grow. Our executives have been featured speakers at conferences by IBC USA, IIR, NICSA, Mutual Fund Education Alliance, Small Funds Network, US Bancorp Fund Services, Federated Investments, MFWire's Most Influential People in Mutual Fund Distribution and FRC's MarkeTrends Conference.

SunStar Strategic is frequently called upon to discuss the latest trends in financial marketing by industry trade publications and newspapers such as *Money Management Executive*, *Ignites*, *PR Week*, *The Washington Post* and *The Wall Street Journal*.

## IDEAS FOR DISTRIBUTION

See SunStar Strategic's blog:  
[FundFactor.net](http://FundFactor.net)



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