



News Release

FOR IMMEDIATE RELEASE

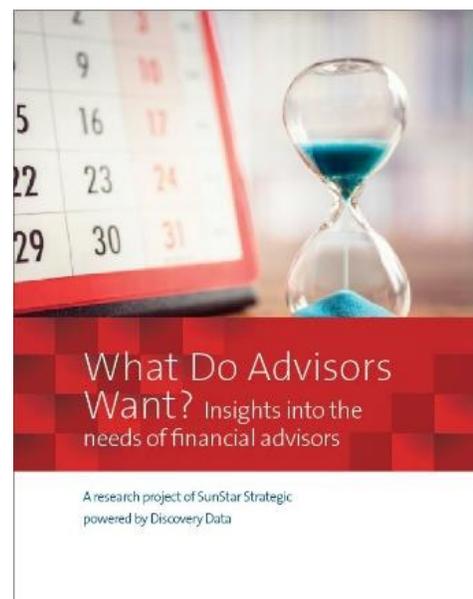
Contact: Ben Gerow
SunStar Strategic
bgerow@sunstarstrategic.com
703.299.8390

SunStar Strategic Releases New Financial Advisor Research

Alexandria, Virginia – October 8, 2018: [SunStar Strategic](#) released the results of its joint financial advisor research project with [Discovery Data](#) today at the [Tiburon CEO Summit XXV](#) in San Francisco, CA. The published report, [“What Do Advisors Want?”](#) is the culmination of an extensive, months-long research project designed to gain insights into the needs and preferences of financial advisors for learning about mutual funds.

“We’re incredibly proud to release this report,” said [Kathryn Morrison](#), president and CEO of SunStar Strategic and speaker at today’s Tiburon Summit. “We’ve gained fresh insights by talking directly with advisors, which will be of great value to our clients. We’ll be able to advise and assist our clients so they can communicate *what* advisors want to hear and *how* they want to hear it.”

In partnering with [Discovery Data](#), SunStar was able to utilize their extensive database of financial advisors and registered investment advisors across the country.



The research was conducted by email survey with follow-up telephone interviews. Topics included where advisors look for information, identifying their “go-to” reliable sources, preferred methods and frequency of contact, desired content and functionality in fund websites and usefulness of public information sources.

“The results of this study validate the advice we give to our asset management and mutual fund clients today. They also suggest new strategies that will enhance their ability to interact with and deliver information to advisors. These ideas can be game changers for some fund companies,” said Morrison.

Advisors shared insights into trusted publications and aggregator sites, as well as their work habits and challenges. They shared likes, dislikes and frustrations - key insights that can help fund companies better deliver content.

The project was the brainchild of Morrison, who sought to uncover new trends and a deeper understanding of the needs of advisors. The scope, method and execution of the study were designed and executed by SunStar’s creative services group.

“We saw this project as an incredible opportunity,” said Morrison. “We were able to talk directly to the people our clients need to reach. This information is highly sought after by fund companies, so that they can efficiently reach the fiduciary community.”

“The advisors were open and eager to share. What we learned will ultimately help everyone do their jobs more efficiently,” she concluded.

About SunStar Strategic

SunStar Strategic provides strategic public relations and inspired marketing communication programs that help its clients attract, maintain, and grow assets. SunStar Strategic focuses first on developing the unique messages that differentiate a firm in a crowded market. The company works closely with its clients to ensure they get the attention and recognition they deserve. SunStar’s robust PR practice spans more than two decades. Core services include public relations and comprehensive digital and print marketing services from strategy through design and execution.

SunStar Strategic, <https://www.sunstarstrategic.com>, has offices in Washington DC, New York, Chicago, and Austin.

About Discovery Data

Discovery Data offers a consolidated view of the financial services and insurance industries, including all BD and RIA firms and trust companies, over 725,000 reps, and 1.8 million insurance agents. Access to data is provided via subscription to an online portal and through the Salesforce app, custom API integrations, and secure HTTPS and FTP sites. Discovery Data is the industry leader in data hygiene services and expert in data-driven market insight, email marketing campaigns and outbound call center lead generation. Many of the world's largest and most successful institutions rely on Discovery Data to understand the industry, and to identify, reach and do business with firms and professionals throughout North America.

Discovery Data, <https://www.discoveryco.com> is headquartered in Eatontown, NJ.

##