



Marketing for Asset Managers: Maximizing Business Assets to Grow Your Assets Under Management

YOUR NEEDS

In an industry where it is increasingly difficult to distinguish one firm from another, asset managers – ranging from large, global investment managers and wealth advisors to hedge funds and boutique firms – require smart marketing to drive awareness, enhance reputations, promote investment capabilities and engage clients.

OUR SOLUTIONS

We build on our knowledge of the investment marketplace, market trends and new, cost-effective ways to reach customers by helping you focus on the unique nuances of your business and distinguish what makes your firm different or better. Our array of strategic and creative services includes:

Strategic Services

- **Messaging:** Artfully communicate your strengths and distinguish your capabilities to an array of audiences, including consultants, plan sponsors, retail investors, employees and the media
- **Voice of the Customer Insights:** Gain a first-hand perspective of what your investors really think and want from you
- **Advocacy Platforms:** Focus on a key issue to create thought leadership, differentiate your firm and connect with key influencers
- **Relationship Marketing:** Develop creative opportunities to enhance “face time” between investors and your brokers, financial advisors and portfolio managers

Creative Services

- **Content Marketing:** Develop cogent, well-written copy with creative design
- **Web Strategies:** Develop investor portals (microsites) accessible on desktops, tablets and mobile devices
- **Presentations:** Create storylines, pinpoint messages and interesting graphics
- **Digital Marketing:** Develop podcasts, webinars and other e-marketing efforts
- **Infographics and Videos:** Visually communicate important information with videos and easy-to-read graphics
- **Communications:** Pursue speaking platforms and media-related opportunities
- **Social Media Marketing:** Create social network sites, blogs and chat rooms

“It takes 20 years to build a reputation and five minutes to ruin it. If you think about that, you’ll do things differently.”

– Warren Buffett

Current Marketing Trends For Asset Managers

Mobile First Marketing

- Ensure a responsive website as nearly 60% of U.S. adults own a smartphone and nearly 50% own a tablet

Content Marketing

- Develop a strategic, sustainable and measurable content marketing discipline:
 - More budget and resources
 - Integration of activities
 - Mix of paid and owned media to boost distribution
 - Quality, well-written content
 - Use of video, photos and web graphics
 - Focus on ROI

Pay-for-Play Amplification

- Boost content distribution and consumption through sponsored posts, promoted tweets, search engine marketing and banner ads

Print Marketing

- Strategically leverage the use of print in an era of shrinking attention spans, email challenges and digital overload

Event Marketing

- Pursue and develop client-centric, in-person events and conferences which, according to information from CMI Research, have been ranked by marketing professionals over the past five years as their most effective marketing tactic

Relevant Experience

For more than 20 years, we have worked with a host of prominent financial services companies, including some of the most well-respected asset managers: global investment management companies; wealth management/financial advisors; boutique, single-asset-class firms; mutual funds; private banks; hedge funds; insurance companies; private equity companies; and online brokerage firms.

MJ Lilly Associates, LLC is a strategic communications consultancy dedicated to developing branding and integrated marketing programs that drive business results. As business people who are marketers and marketers who are business people, we are regarded for the integrity of our work and the depth of our bottom-line driven programs. Please contact us at mjlilly@mjlilly.com or phone 718-855-1853 for more information.

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