



CAPITAL INSIGHT

THINK. CONNECT. INVEST.

STRATEGIC INVESTOR RELATIONS AND FINANCIAL MEDIA CONSULTING FOR INVESTMENT MANAGERS

IT'S A COMPETITIVE MARKETPLACE FOR INVESTMENT MANAGERS SEEKING NEW INVESTOR FUNDS, AND TO MANAGE AND EXPAND THEIR CLIENT BASE. ONE OF THE KEYS TO MAINTAINING AND GROWING A VIBRANT CLIENT BASE IS EFFECTIVE, DISCREET COMMUNICATIONS THAT PROVIDE VISIBILITY FOR A FIRM'S INVESTMENT PHILOSOPHY, FUND AND ADVISOR PERFORMANCE, KNOWLEDGE, AND RELIABILITY.

Through a strategic relationship with Capital Insight Partners (www.capitalinsight.com), investment managers can benefit from sophisticated financial media outreach and client marketing services. Capital Insight offers investment advisors website analysis and content development, assistance in gaining visibility through blogging and white papers, outreach to media favored by potential clients, client marketing materials, and more.



ADAM STRAUSS, CO-PORTFOLIO OF THE APPLESEED FUND, ONE OF THE TOP-PERFORMING SRI AND MIDCAP VALUE FUNDS IN THE U.S., ACCORDING THE MORNINGSTAR RANKINGS, SAID:

Capital Insight Partners' results-oriented and innovative approach has generated exceptional results for The Appleseed Fund – well in excess of what we might have expected as a relatively young fund. Their extensive contacts and their knowledge of and ability to communicate investment metrics have led to high quality media, authorship, and news opportunities and enhanced website content. Capital Insight's understanding of the regulatory environment in which we as mutual fund managers operate is far beyond traditional PR firms. As a result, while helping us showcase our fund and strategies, they've helped us tailor communications to minimize compliance issues. Their expertise is both reassuring and a time-saver. In a competitive marketplace for investment dollars, Capital Insight has enabled us to enhance our visibility while maintaining our values of putting performance first and being discreet yet effective in our investor communications.

WHY CHOOSE CAPITAL INSIGHT PARTNERS

We have worked with hundreds of investment managers over the years, facilitating communications between corporate clients and professional investment managers. These relationships, and the perspectives we have of the “buy side” and successful investment management strategies, give us a significant advantage over other marketing or communications firms you might consider. We understand the specific issues related to marketing investment management services in an effective yet discreet manner. Our communications recommendations are made with an understanding of compliance issues, FINRA guidelines and ground rules related to discussing fund and investment advisor performance. Working with fund and compliance administrators, we facilitate the review and approval process of your communications and outreach that require compliance review.

1. OUR EXPERIENCED TEAM OF FINANCIAL MEDIA EXPERTS INCLUDES FORMER REPORTERS FOR WELL-KNOWN PUBLICATIONS SUCH AS CRAIN’S, THE NEW YORK TIMES, AND USA TODAY. WE ALSO UNDERSTAND “NEW MEDIA” – LIKE HOW TO REACH OUT TO BLOGGERS AND A GROWING BASE OF YOUNGER INVESTORS THAT ARE ONLINE AND MEDIA SAVVY.
2. WE PROVIDE STRATEGIES AND EXECUTION FOR NEW CLIENT OUTREACH AND MARKETING, AS WELL AS SUPPORT COMMUNICATING WITH CURRENT CLIENTS.
3. CAPITAL INSIGHT IS EXPERT AT HELPING ADVISE YOU ON DEVELOPING EFFECTIVE WEBSITES FOR COMPANIES IN THE INVESTMENT INDUSTRY. ANYONE CAN BUILD A NICE WEBSITE THESE DAYS AT A REASONABLE COST. CAPITAL INSIGHT’S EXPERTS KNOW WHAT YOU NEED TO SAY, HOW TO SAY IT, AND HOW TO DRIVE TRAFFIC TO THE AUDIENCE YOU ARE TARGETING.
4. IF YOU WOULD LIKE TO BUILD YOUR FIRM’S VISIBILITY WITH A TARGETED CLIENT BASE, WE CAN HELP ESTABLISH YOU IN MEDIA AND ONLINE AS A RESOURCE FOR INVESTING INFORMATION AND ADVICE, WHICH CAN HELP INTRIGUE AND ATTRACT POTENTIAL CLIENTS.

WE LOOK FORWARD TO SPEAKING WITH YOU.

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