



# HF ALPHA MARKETING

**Create a marketing edge.  
Raise awareness and  
achieve competitive  
differentiation to support new  
business development.**

## **HF ALPHA MARKETING delivers:**

### ▶ **Marketing materials:**

- Pitchbook(s)
- Fact sheets
- Monthly, quarterly report templates
- Email format
- Stationery system
- Folder / investment kit

### ▶ **Website mapping and implementation**

- Copy, design and programming
- Online reporting

### ▶ **Advertising: online and traditional**

- Media strategy
- Creative execution
- Media placement

### ▶ **Public relations**

- Media outreach
- Corporate responsibility

### ▶ **Social Media**

- Communications strategy
- Presence on key sites
- Private networks

For Hedge Funds, a new era is dawning. Following the financial crisis and well-publicized scandals, a wave of consolidation and new regulations are significantly changing the rules of engagement for the hedge fund industry.

While this presents new challenges, it also presents growth opportunities for smart, well-managed players with consistent track records. Hedge fund firms need to retool their marketing efforts to drive awareness, achieve competitive differentiation and embrace the communications opportunities permissible to registered investment advisors.

**HF ALPHA MARKETING** helps hedge fund companies better distinguish their firms with the right message and the right communications approach to enhance new business development.

Combining our knowledge of the hedge fund marketplace with an understanding of the buy-side community, **HF ALPHA MARKETING** includes an assessment of a firm's communications efforts to determine marketing needs, develop a full-range of tools, and deliver them in a timely fashion. This includes:

### ▶ **Strategic content and copy development**

### ▶ **New / refreshed logos and graphic design standards**

### ▶ **State-of-the-art technology for security, confidentiality and online reporting**

### ▶ **Advertising, public relations and social media opportunities**

### ▶ **Fixed fees to assist in budget planning**

## Hedge Fund Facts

- 1** As of March 2009, 55% of hedge funds were already registered with the SEC – giving these firms a “leg-up” in pursuing additional advertising and marketing initiatives.
- 2** According to a recent *Financial Times* survey, 50% of professional investors indicate they expect to make significant to moderate increases in their hedge fund allocations – creating new business opportunities.
- 3** A 2009 Goldman Sachs report confirms “rationalization” within the hedge fund industry with the “big getting bigger, the small staying smaller, and those in the middle shrinking” – making it essential for many solid players to step up their marketing efforts.
- 4** The growing number of hedge fund investment platforms, managed accounts and UCITS is expanding the potential investment universe – supporting the need for broader and more enhanced marketing programs.

## Pricing Guidelines\*

<b>Strategic review and messaging</b>	\$3,750 to \$5,500
<b>A new or refreshed logo</b>	\$9,000 to \$11,000
<b>Graphic design standards program</b>	\$3,750 to \$7,500
<b>Marketing materials:</b>	
▶ Pitchbook(s) (design and copy)	\$7,500 to \$15,500
▶ Fact sheets (2-sided) (design and copy)	\$1,750 to \$2,000
▶ Monthly, quarterly report templates	\$1,250 to \$4,500
▶ Email format	\$1,250 to \$1,750
▶ Stationery system	\$1,750 to \$2,750
▶ Folder / investment kit	\$1,250 to \$4,000
<b>Website mapping and implementation</b>	
▶ Copy, design and programming	\$30,000 to \$45,000
▶ Online reporting	TBD
<b>Advertising</b>	
▶ Creative execution (design and copy)	\$2,750 to \$4,500 per ad
▶ Media placement strategy	\$2,750
<b>Public relations</b>	
▶ Media outreach (retainer based)	\$4,000 to \$5,500 per month
▶ Corporate responsibility	TBD
<b>Social media</b>	
▶ Presence on up to four key sites	\$3,500
▶ Communications strategy	TBD
▶ Private networks	TBD

\* Prices reflect estimated ranges and do not include printing, media-buying, photography and miscellaneous expenses.

**HF ALPHA MARKETING** is a product of MJ Lilly Associates LLC in conjunction with Russell Design. We offer extensive financial marketing and communications capabilities working with a full range of asset managers, including a specific focus on hedge fund firms. Our strategic approach, from graphic design to social media, combined with our understanding of hedge fund industry issues, sets us apart from other branding and marketing firms. We also offer flexibility in working with an array of technology partners to provide hosting and reporting solutions that address the various levels of security and functionality clients require.

## Client Experience

Blue Ridge Capital  
Butler Capital  
Broad Street Capital Group  
Covepoint Capital Advisors  
Eastern Advisors  
Investcorp  
Ivy Asset Management  
K2 Advisors  
Muirfield Capital Management  
North Sound Capital  
Solomon Lewis  
Zweig-DiMenna Associates

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