



# THIRD PARTY MARKETING

BY  
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- *A logical and cost effective approach to sales and marketing*

Third party sales and marketing is a proven means of providing comprehensive and cost effective services to quality money managers who wish to increase their assets under management. Good managers, both large and small, may, for a variety of reasons, wish to obtain external sales and marketing expertise.

Such reasons might include:

- A rapid start to effective sales and marketing
- Significant early cost savings
- Immediate exposure to consultants and manager searches
- Timely data submission to relevant consultant databases
- Optimization of a manager's time and resources between research, portfolio management and sales and marketing

- *... and it solves a multitude of issues and problems*

Many money managers lack effective sales and marketing resources and, as a result their asset growth tends to plateau.

Over time money managers may face the dilemma of deciding whether to increasingly split their time between managing money and conducting sales and marketing or outsourcing sales and marketing to a proven, successful provider.

Seasoned firms with good investment philosophies, cohesive investment teams, proven track records and adequate asset bases are excellent candidates for third party marketing.

**SINCE ITS INCEPTION 25 YEARS AGO, THIRD PARTY MARKETING HAS BECOME A SUCCESSFUL APPROACH TO INCREASING ASSETS UNDER MANAGEMENT.**

## Typical Services of Third Party Marketing firms:

- *Sales and marketing materials*
  - design presentation materials
  - create quarterly "Flash" reports
  - assist in preparing performance disclosure statements
- *Databases and quarterly updates; search questionnaires and RFP's*
  - complete database questionnaires
  - provide quarterly updates
  - respond to search opportunities
- *Direct sales and marketing*
  - manager presentation training along with critiques prior to undertaking sales and marketing road trips
  - introductory meetings with a wide variety of consultants
  - updating consultants
  - finals presentation training
  - fee negotiation assistance for new accounts.



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