

**AGILE
MARKETING
IN THE
AGE OF
DISRUPTION**

BUILD.



MEASURE.



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2017 ANNUAL CONFERENCE

The Westin Grand Central | Nov.13 & 14, 2017

Building an Honest, Effective Voice with a Strong Social Content Strategy



@mikecorasaniti



/michaelcorasaniti

Michael Corasaniti, Digital Marketing, Legg Mason

Asset managers have rightfully ramped up their investment and focus in social media strategies, however, many digital content teams still struggle to define their voice. How much and what kind of content should they produce, and on which channels should they distribute it?

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LEGG MASON

GLOBAL ASSET MANAGEMENT

Brandywine  GLOBAL

 CLARION PARTNERS

ClearBridge
Investments

EnT  TrustPermal


MARTIN CURRIE

 QS Investors

 RARE

Royce & Associates

 WESTERN ASSET

- Founded in 1899
- HQ: Baltimore, MD
- Nine investment affiliates
- Offices in New York, Stamford, CT, and around the world
- Nine investment affiliates headquartered in the U.S., Europe, and Australia

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Why Social Media?

The use of social media in asset management has exploded over the last five years, with firms rightfully devoting more effort and attention to their social media strategies.

Social strategies that were once an afterthought are now compulsory for firms looking to engage their audiences in places they are already active.

Firms are doing a **disservice** to their branding, their employees, and their audience by not developing a social media strategy that reflects their values, goals, and expertise.





How do you build an honest, effective voice?

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LinkedIn

Transamerica
2w

You can borrow for college but you can't borrow for retirement!

Clients helping their children with college tuition from their retirement savings may be generous, but it can have a serious effect on their retirement plans. Read more: <https://lnkd.in/em9NCwc>




Student Loan Debt Affects Retirement: 3 Conversations to Have
newageofadvice.com

177 Likes · 6 Comments

Morgan Stanley
3w

A new generation of house hunters enters a U.S. market near historic lows in listings, setting the stage for what could be another residential market boom.



Investing in the Next U.S. Housing Boom
morganstanley.com

97 Likes · 3 Comments

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J.P. Morgan Asset Management
3w

Conventional 401(k) searches start with choosing a recordkeeper first, then a TDF manager. Discover how reversing this search order allows you to maintain a prudent plan selection while taking advantage of potential discounts. <http://bit.ly/2yVMbJK>

EMPOWERING BETTER DECISIONS

Cumulative total plan costs for ten years



Search Method	Cumulative Total Plan Costs for Ten Years
CONVENTIONAL SEARCH	\$1,662,477
REVERSE THE SEARCH	\$1,043,881

LET'S SOLVE IT.™

Reverse the search: An alternative approach to defined contribution re...
am.jpmorgan.com

77 Likes · 3 Comments

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Twitter



ColumbiaThreadneedle @CTInvest_US

Colin Moore explains the components of return and how the costs of active management have become more transparent:

A change in investment pricing transparency
Fee pressure on active managers will continue even when active outperforms passive, says Colin Moore.

T. Rowe Price @TRowePrice

Learn about the challenges #investors are facing in emerging debt markets, with portfolio specialist Benjamin Robins trowe.com/2xKzShB

Macroeconomic headwinds present in **EMERGING DEBT MARKETS**

- ↑ RISING INTEREST RATES IN DEVELOPED MARKETS
- ↗ POTENTIAL FOR SHARP CORRECTION
- ↓ MARKET DISPERSION IS DECLINING

[LEARN MORE](#)

Wells Fargo AssetMgt @WFAssetMgmt

Majority Of #Millennials Are Happy Despite Financial Anxiety
wellsfargofunds.com/ip/campaign/mi...

Millennials, Happiness and Money
The study finds that millennials who are actively engaged with their money are happier, according to the 2017 Wells Fargo Millennial Study.

69% say they want to "get over their anxiety about money"

32% say they are satisfied with their financial life

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Facebook

BlackRock
October 5 at 1:30pm · 🌐

Hands in for #retirement! This week, we kicked off our annual 401(k) challenge in the U.S., promoting physical fitness and financial wellness among our employees. #BlackRock employees all around the U.S. received these 401(k) challenge bracelets to help spread our message around saving for retirement, and are encouraged to complete at least 4.01 kilometers of physical activity.



Like Comment Share

26 Chronological



JPMorgan Chase & Co.

October 11 at 9:09pm · 🌐

Advisors: There's a good chance your clients will live a long time. See how our 7 Principles for Long-Term Investing can help you guide them towards better decisions.

THERE'S A
GOOD CHANCE
YOU COULD LIVE
UNTIL 90.*

*See landing page for additional detail.

FUNDS by **J.P.Morgan**
Asset Management

Principles for successful long-term
investing
am.jpmorgan.com

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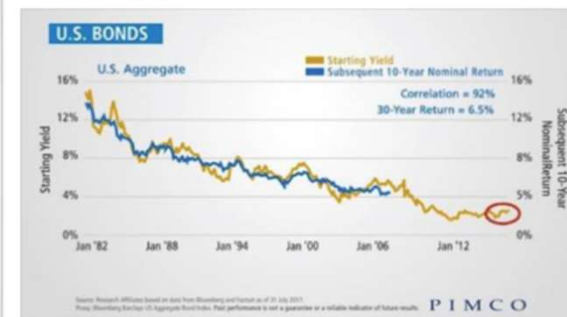
REPEAT.



PIMCO

September 21 · 🌐

Traditional 60/40 portfolios lack meaningful exposure to satellite markets – is there a cost? <http://pim.co/5nwt8>

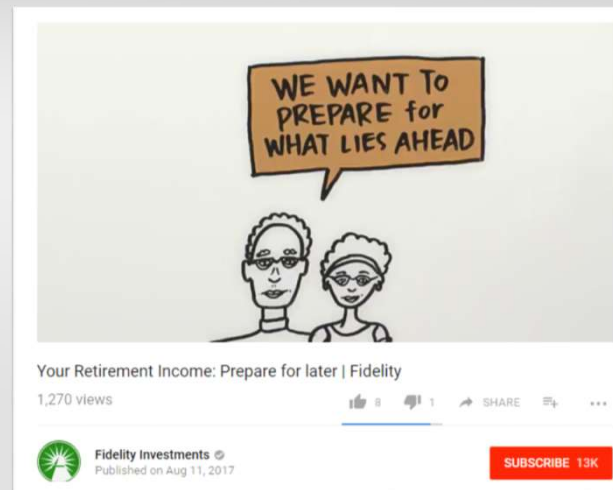


Like Comment Share

12

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Harvest Exchange

(And other industry-focused platforms)



Royce Funds

Small-cap investing specialist offering mutual funds with unique invest...

Oct 16, 2017

Are Small-Cap Cyclical's Signaling Good News About the Economy?

Small-cap returns have often been seen as something like economic mood rings, those briefly trendy baubles from the 1970s. Broad-based bullishness is thought to reveal confidence or optimism about growth while more narrow markets (usually led by ...



BlackRock

BlackRock is the world's largest asset manager

Oct 17, 2017

How to benchmark smart beta

Fall is here, which means I finally get to sleep in on Saturday mornings, instead of going to my eight-year old's weekly swim meets. My daughter wasn't the biggest fan of the 8 a.m. meets and grueling practice sessions, but this summer I saw a lot of ...

Investment	Asset Allocation	Assets
Investment	Asset Allocation	Assets
Investment	Asset Allocation	Assets
Investment	Asset Allocation	Assets

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Franklin Templeton Investments

Official Franklin Templeton Investments account. For US investors only.

[My Feed](#)



A Selective Look at Corporate Credit

October 20, 2017

Author



Edward D. Perks, CFA
[Executive Vice President,](#)
[Chief Investment Officer,](#)
[Franklin Templeton Multi-Asset Solutions](#)

US Economic Overview and Market Backdrop

Several US economic indicators have improved since the start of the year. We've seen robust job growth, an upgraded gross domestic product forecast, incremental improvement in consumer spending and rising consumer confidence. And, the last corporate earnings reporting cycle saw many upside surprises.

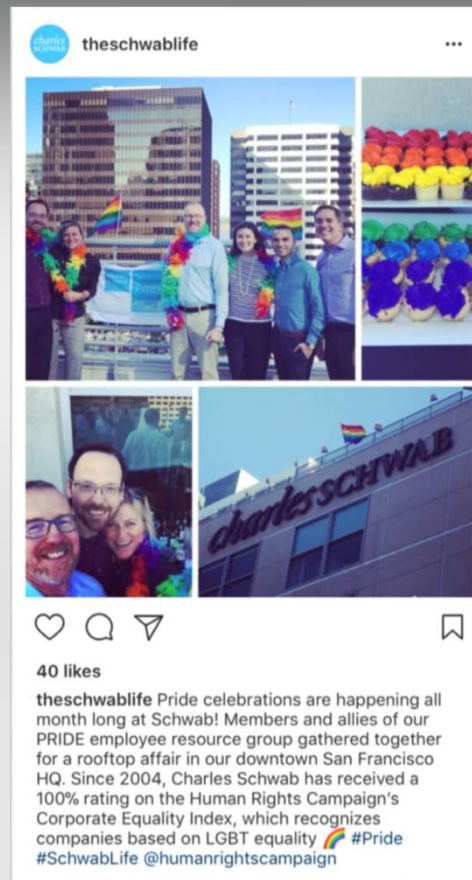
Against a backdrop of strong fundamentals in corporate America, the market has so far mostly shrugged off controversial US health care legislation, a dangerous and costly US hurricane season and tensions around North Korea's nuclear ambitions.

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Instagram



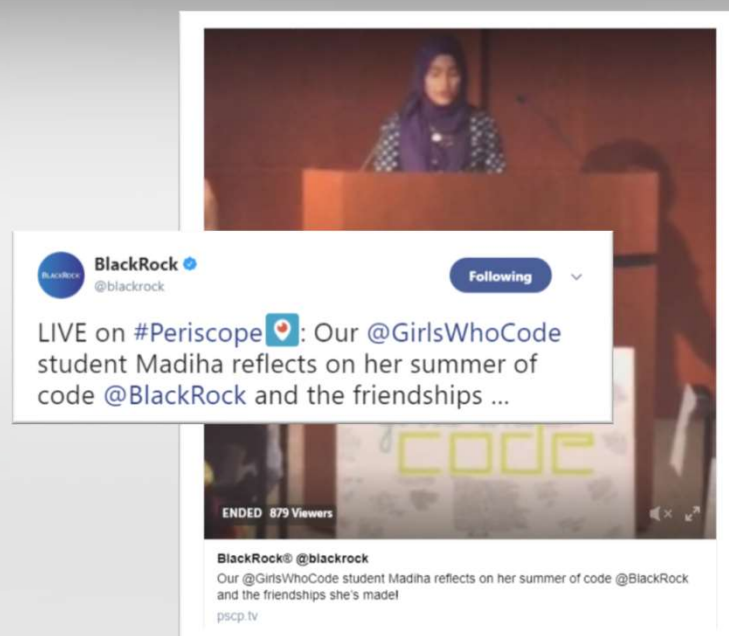
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Periscope

(And other live platforms)



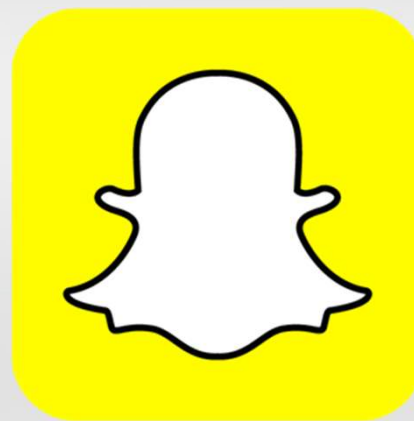
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What comes next?



Global Platforms

(Sina Weibo, WeChat, more...)



Snapchat



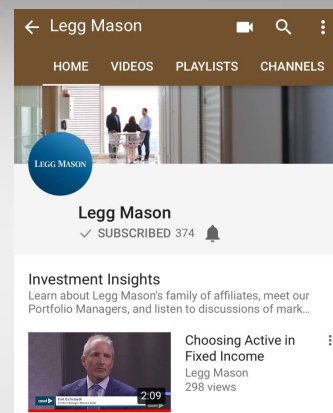
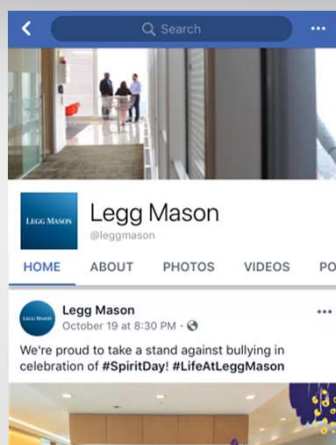
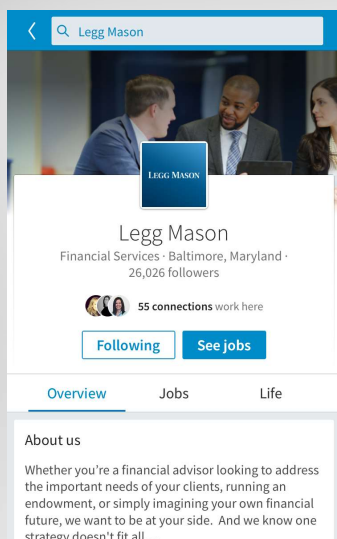
Pinterest

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Legg Mason's Journey



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Thought Leadership & Educational Resources



The muni environment is changing rapidly – and navigating it requires analytical rigor
@WesternAsset bit.ly/2xRqJ75



Things didn't always go as expected in 2016; what about 2017? Explore what could go right for investors next year: bit.ly/2ikpbL5



FAs: You know SMAs mean your clients stay involved in their investments. Do THEY know that? bit.ly/2IOuMuP #FinancialLiteracyMonth

FINANCIAL ADVISORS:
Is an SMA right for your clients? You should ask them...



Would you like more influence over your investments?



Would you like a potentially closer relationship with your manager?



FAs: Help your clients learn the difference between an SMA and a Mutual Fund. Here's out how to explain it: bit.ly/2IOuMuP

SMA	MUTUAL FUND
Dedicated investment account containing stocks, bonds, cash and other securities	Professionally managed investment that pools money from many investors to purchase securities
Investor owns the individual securities, allowing for greater degree of customization	Investor owns a share in a pool that owns the securities, but does not own them directly
Investor may have continuous interaction with portfolio manager	Investor does not interact with fund manager
Highly tax efficient	Tax efficiency determined by portfolio turnover

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Life At Legg Mason



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Sponsored Campaigns & Targeting



Legg Mason
1mo

Financial Advisors: Don't let your clients with college-bound grandchildren go it alone on choosing 529 college savings programs: <https://lnkd.in/fHWPEPk>

HOW TO PAY FOR COLLEGE



Get Started
leggmason.com

32 Likes · 1 Comment

Legg Mason
1mo

Grandparents: Open a 529 college savings plan, and potentially reduce your family's estate tax burden while providing an educational legacy. Learn more 529 rewards now: <https://lnkd.in/fg8ruuX>

LEAVING A LEGACY THROUGH 529

[LEARN MORE](#)

Leaving a Legacy Through 529
leggmason.com

12 Likes

Legg Mason
8mo

Financial Advisors: Need a solution for risk-averse investors looking for additional income? Go back to basics: https://lnkd.in/d_dzatV


THE THREE Rs OF DIVIDEND

36 Likes · 1 Comment

Legg Mason
8mo

How do you explain SMAs to your clients? Keep it short and simple, and geared towards their benefits. Discover more: <https://lnkd.in/dSQXsuw>

Put simply, an SMA is for investors who...



- Seek the comfort of professional investment guidance and a heightened level of personal service
- Still want to take an active role in their financial life
- Desire the flexibility to invest in different strategies or styles, while seeking the liquidity and potential tax benefits that come from owning individual securities in separate accounts, versus mutual funds

82 Likes · 1 Comment

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Brand Engagement



Legg Mason @leggmason
Joe's happy to fill in when you're out of town, @JoeSquawk



Mark Ruffalo liked your Tweet.

Legg Mason @leggmason
Hi, @seerichards - coincidentally, we're about seeing what others don't to find opportunity for our clients. Here's to bright forecasts!

Chris Richards @seerichards · Jan 18
Replying to @leggmason
nice on-brand reply 🙄🙄 your logo is usually my nightlight, so it was sorely missed.

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