

**AGILE  
MARKETING  
IN THE  
AGE OF  
DISRUPTION**



**PAICR** | THE ASSET  
MANAGEMENT  
MARKETING  
ASSOCIATION  
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



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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

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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](http://newageofadvice.com)

177 Likes · 6 Comments

Morgan Stanley  
3w

+ Follow

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](http://morganstanley.com)

97 Likes · 3 Comments



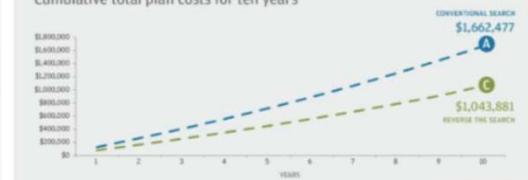
J.P. Morgan Asset Management  
3w

+ Follow

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



Years	Conventional Search (\$)	Reversed Search (\$)
1	1662477	1043881
2	2349956	1517762
3	3037435	1991643
4	3724914	2465524
5	4412393	2939405
6	5109872	3413286
7	5807351	3887167
8	6504830	4361048
9	7202309	4834929
10	7899788	5308809

CONVENTIONAL SEARCH  
\$1,662,477  
A

REVERSE THE SEARCH  
\$1,043,881  
C

LET'S SOLVE IT.  
JPMorgan  
Asset Management

Reverse the search: An alternative approach to defined contribution re...  
[am.jpmorgan.com](http://am.jpmorgan.com)

77 Likes · 3 Comments

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Twitter

 **Columbia Threadneedle**   
@CTInvest\_US

Follow

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



2:39

**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

Following

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



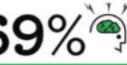
 **Wells Fargo Asset Mgmt**   
@WFAssetMgmt

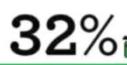
Following

Majority Of **#Millennials** Are Happy Despite Financial Anxiety [wellsfargofunds.com/ip/campaign/mi...](http://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](http://am.jpmorgan.com)

[Learn More](#)

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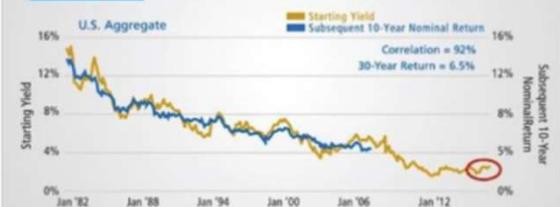


PIMCO

September 21

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

U.S. BONDS



[Like](#) [Comment](#) [Share](#)

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Preparing for the Next Recession

1,599 views

1 like 5 dislike 0 share ...

 PIMCO  
Published on Aug 16, 2017

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Your Retirement Income: Prepare for later | Fidelity

1,270 views

1 like 8 dislike 1 share ...

 Fidelity Investments  
Published on Aug 11, 2017

SUBSCRIBE 13K



Life at BlackRock

2,816 views

1 like 11 dislike 1 share ...

 BlackRock  
Published on Aug 30, 2017

SUBSCRIBE 7.6K

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(And other industry-focused platforms)

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

Oct 16, 2017

## Are Small-Cap Cyclical 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 ...





 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**

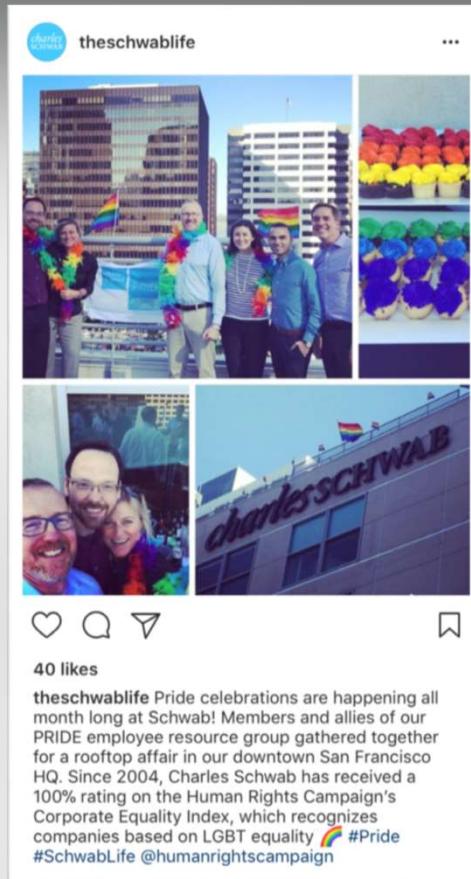
Several US economic indicators have improved since the start of the year. We've seen robust job growth, an upgraded gross domestic product forecast, incremental improvement in consumer spending and rising consumer confidence. And, the last corporate earnings reporting cycle saw many upside surprises.

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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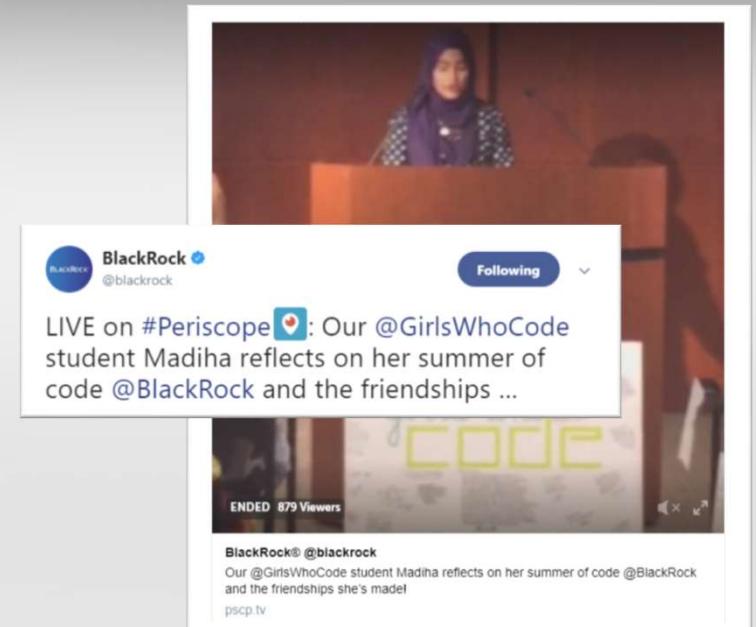
Instagram



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## Periscope (And other live platforms)



BlackRock  @blackrock Following

LIVE on #Periscope : Our @GirlsWhoCode student Madiha reflects on her summer of code @BlackRock and the friendships ...

ENDED 879 Viewers

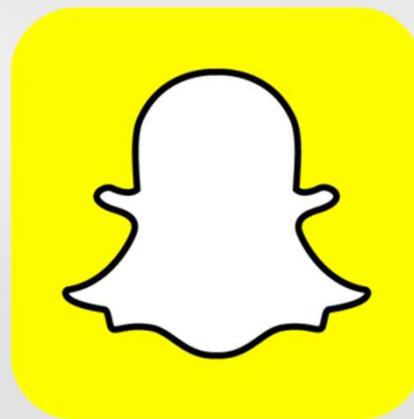
BlackRock® @blackrock Our @GirlsWhoCode student Madiha reflects on her summer of code @BlackRock and the friendships she's made! pscp.tv

## What comes next?



### Global Platforms

(Sina Weibo, WeChat, more...)



Snapchat



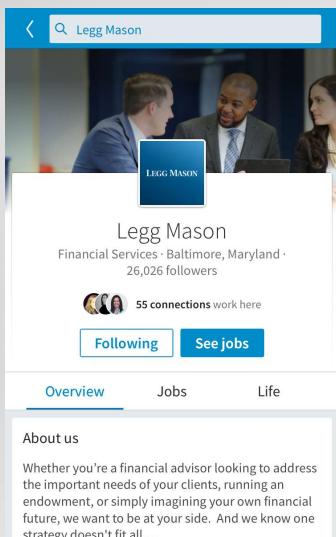
Pinterest

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## Legg Mason's Journey



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Financial Services - Baltimore, Maryland - 26,026 followers

55 connections work here

Following See jobs

Overview Jobs Life

About us

Whether you're a financial advisor looking to address the important needs of your clients, running an endowment, or simply imagining your own financial future, we want to be at your side. And we know one strategy doesn't fit all...



Legg Mason  @leggmason

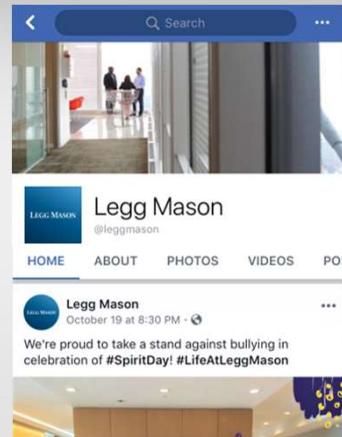
A leading global investment company with specialized expertise in equities, fixed income, and alternatives. Social Media Guidelines: [bit.ly/1rGkhN7](http://bit.ly/1rGkhN7)

© Baltimore, MD [leggmason.com](http://leggmason.com)

876 Following 11.6K Followers

Tweets Tweets & replies Media Likes

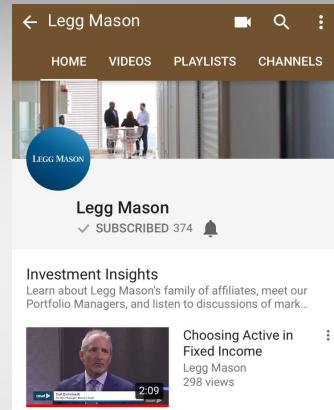
Legg Mason  @leggmason · 6h How does Royce incorporate #ESG into its investment process? [@RoyceFunds](#) Chris Clark and Gunjan Banati discuss: [bit.ly/2yGxKrN](http://bit.ly/2yGxKrN)



Legg Mason  @leggmason

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Legg Mason · October 19 at 8:30 PM ·  We're proud to take a stand against bullying in celebration of #SpiritDay! #LifeAtLeggMason



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Legg Mason  SUBSCRIBED 374

Investment Insights

Learn about Legg Mason's family of affiliates, meet our Portfolio Managers, and listen to discussions of mark...

Choosing Active in Fixed Income

Legg Mason 298 views



leggmasonglobal 

138 posts 295 followers 12 following

Edit Profile

Legg Mason  
Designed for What You Imagine<sup>SM</sup>.  
Social media guidelines:  
[bit.ly/1rGkhN7](http://bit.ly/1rGkhN7)

#SpirityDay



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## Thought Leadership & Educational Resources

Legg Mason  @legg Mason

The muni environment is changing rapidly – and navigating it requires analytical rigor  
@WesternAsset [bit.ly/2xRqJ75](http://bit.ly/2xRqJ75)



MANAGED MUNIS:  
**THE VALUE OF CHOICE**

Legg Mason  @legg Mason

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



ANNUAL OUTLOOK  
**SURPRISES AHEAD? BE READY**

Legg Mason  @legg Mason

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

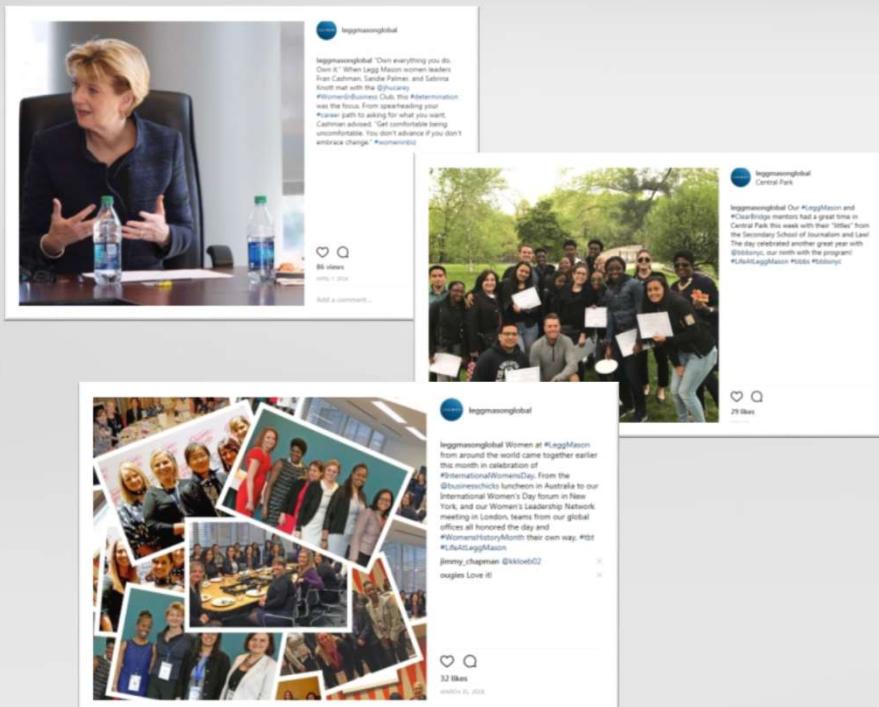
FINANCIAL ADVISORS:  
Is an SMA right for your clients? You should ask them...

Would you like more influence over your investments?  
Would you like a potentially closer relationship with your manager?

**SMA**  
Dedicated investment account containing stocks, bonds, cash and other securities  
Investor owns the individual securities, allowing for greater degree of customization  
Investor may have continuous interaction with portfolio manager  
Highly tax efficient

**MUTUAL FUND**  
Professionally managed investment that pools money from many investors to purchase securities  
Investor owns a share in a pool that owns the securities, but does not own them directly  
Investor does not interact with fund manager  
Tax efficiency determined by portfolio turnover

## Life At Legg Mason



Legg Mason  @legg Mason  
We loved working with @livingclassroom to organize school supplies for students. Good luck to everyone this school year!  
#LifeAtLeggMason



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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



LEAVING A LEGACY THROUGH 529

Leaving a Legacy Through 529  
legg Mason.com

Get Started  
legg Mason.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

Leaving a Legacy Through 529  
legg Mason.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](https://lnkd.in/d_dzatV)

THE THREE RS OF DIVIDENDS

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 asset classes, while seeking the liquidity and potential tax benefits that come from owning individual securities in separate accounts, versus mutual funds

36 Likes · 1 Comment

82 Likes · 1 Comment

## Brand Engagement

 **Squawk Box**  @SquawkCNBC 

That moment when you realize you have a twin...

cc: @JoeSquawk, @leggmason



 Legg Mason  @leggmason

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

 Legg Mason @leggmason

Green technology is not only good for the climate – it's also good for business. Register here for our #ESG panel: [bit.ly/2oC6mug](http://bit.ly/2oC6mug)



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.