



- This child was 1 in 2011. She is now 6

Mobile Marketing for Asset Management

A New Way to Engage



Your Philosophy Matters

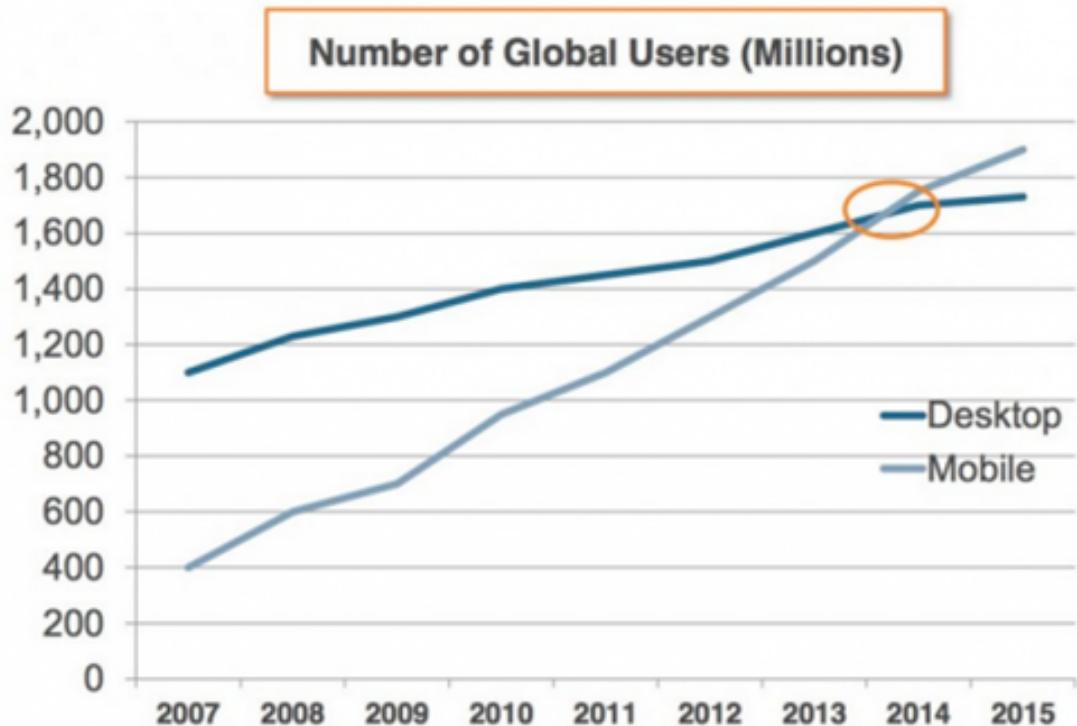
Lyceus Group serves the modern marketing needs
of the investment management industry.

Wait, what do you do?

- Public Relations
- Digital Marketing
- Copy Editing
- Thought Leadership
- Content Distribution



The World Today



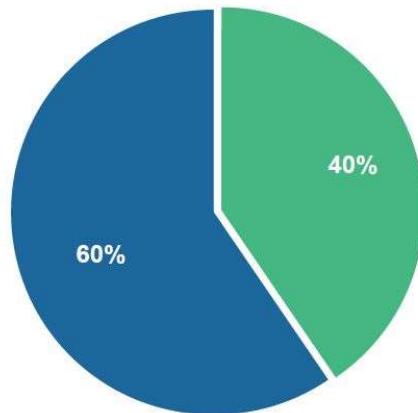
Brief History of Mobile Phone Usage

Mobile Phone Users – 1995 → 2014...
1% to 73% Population Penetration Globally

1995
80MM+ Mobile Phone Users
1% Population Penetration



2014
5.2B Mobile Phone Users
73% Population Penetration



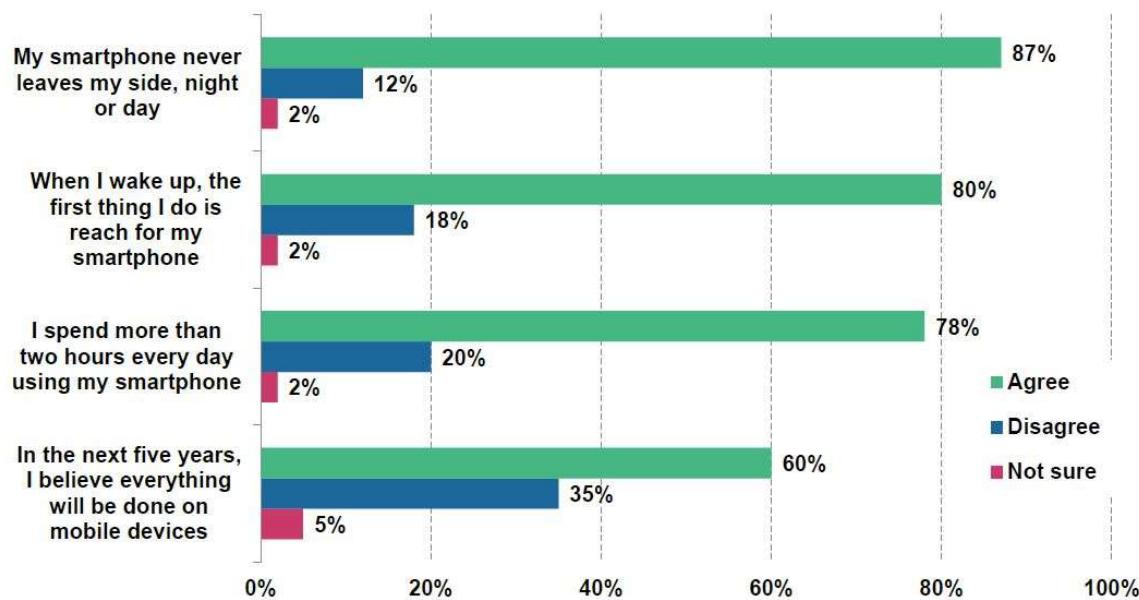
■ Smartphone ■ Feature Phone

Source: KPCB, Informa, World Cellular Information Service (WCIS). Assumes in 1995, one mobile phone subscription per unique user (no duplication). Note: In 2014, user base per KPCB estimates based on Morgan Stanley Research and ITU data. Smartphone users & mobile phone users represent unique individuals owning mobile devices; mobile subscribers based on number of connections & may therefore overstate number of mobile users.

Smartphones Usage

Millennials = Love Their Smartphones...
87% = 'Smartphone Never Leaves My Side'

Millennial Smartphone Behavior, USA, 2014

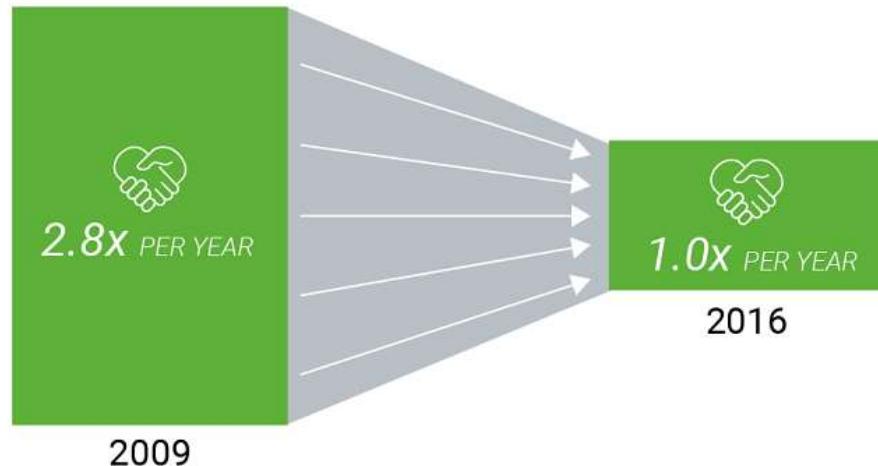


Source: KPCB. Zogby Analytics. Note: Zogby Analytics was commissioned by Mitek Systems, Inc. to conduct an online survey of 1,019 millennials who have a smartphone. For the purposes of this survey, "millennials" are defined as adults between the ages of 18-34. All interviews were completed May 30 through June 6, 2014. Sums may exceed 100% owing to rounding.

Human Interactions are in Decline

- Since 2009, the average number of face-to-face meetings per year between wholesalers and the advisors they support has declined from 2.8 to just 1.0 in 2016.
- The percentage of advisors whose perception of a firm's overall capabilities *is influenced by the digital experiences* provided by asset managers has increased significantly, from 58.7% in 2015 to 72.8% in 2016.

Frequency of advisor meetings has declined



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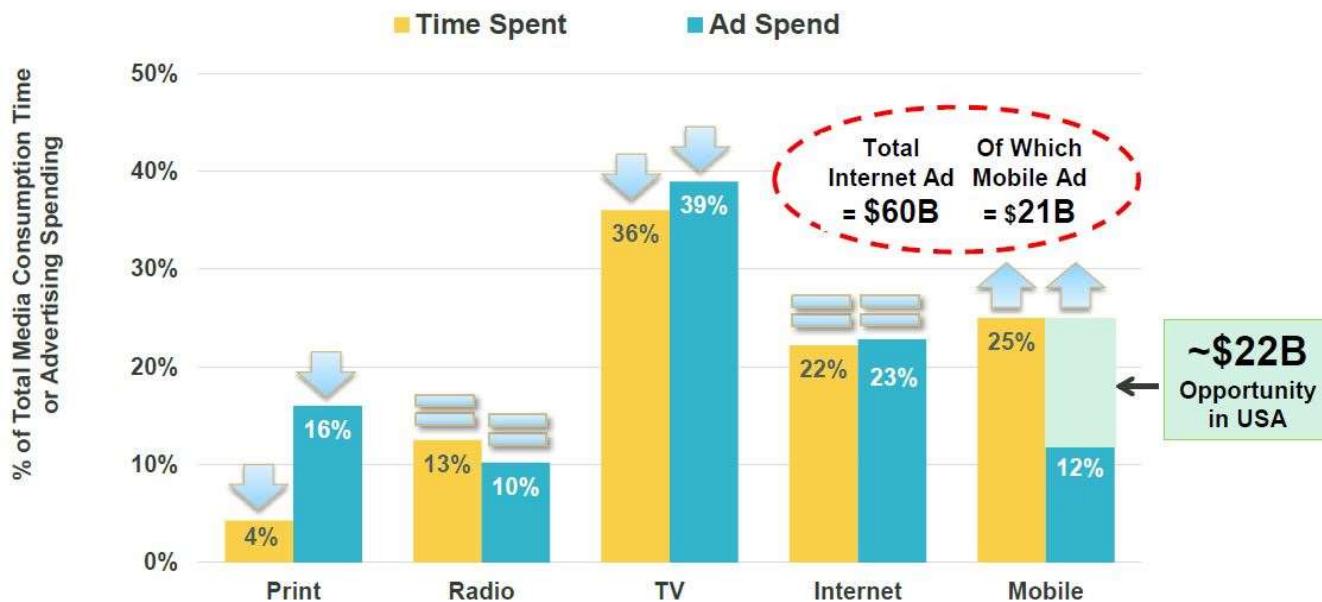
Where is the Alpha for Asset Managers?

- 73% of advisors said the digital experiences provided by asset managers influence their view of a firm's overall capabilities—an **increase of 16 points** from 2015.
- Only **16.3%** of advisors tell Kasina that asset managers are meeting their digital expectations.

What Does Alpha Look Like?

Advertisers Remain Over-Indexed to Legacy Media

% of Time Spent in Media vs. % of Advertising Spending, USA, 2015



Source: KPCB. Advertising spend based on IAB data for full year 2015. Print includes newspaper and magazine. Internet includes desktop + laptop + other connected devices. ~\$22B opportunity calculated assuming Mobile ad spend share equal its respective time spent share. Time spent share data based on eMarketer 4/16. Arrows denote Y/Y shift in percent share. Excludes out-of-home, video game, and cinema advertising.

So What are My Options

PAID

- Banner display ads
- In-App
- Streaming (ads on Pandora)
- Videos
- Text
- Paid social ads
- Location-based/geo-targeting
- Sponsored content
- Public Relations

FREE-*ish*

- Mobile Responsive Website
- Email Campaigns
- Newsletters
- Content Creation
- Social Media
 - LinkedIn
 - Twitter
 - Facebook

Where to Start

- Is your website mobile responsive
- Are your emails mobile friendly
- Are email links mobile friendly
- Social Media
- Incorporate PR
- Are you monitoring via Google Analytics, Hubspot

Mobile-Friendly Test

<https://www.queensroadfunds.com/>

Not mobile-friendly

Page appears not mobile-friendly

- ✗ Text too small to read
- ✗ Mobile viewport not set
- ✗ Content wider than screen
- ✗ Links too close together

This page may appear not mobile-friendly because the robots.txt file may block Googlebot from loading some of the page's resources. Learn how to [unblock resources for Googlebot](#).

If you've made sure Googlebot is not blocked, you can see [Pagespeed Insights](#) for more details on detected issues. Learn more about the differences between the two tests.

How Googlebot sees this page

This page uses 6 resources which are blocked by robots.txt.

Does this screenshot look incorrect? [Learn how to let Googlebot view the page correctly.](#)

» Show resources



Mobile-Friendly Test

<https://www.jenseninvestment.com/>

Awesome! This page is mobile-friendly.

How Googlebot sees this page

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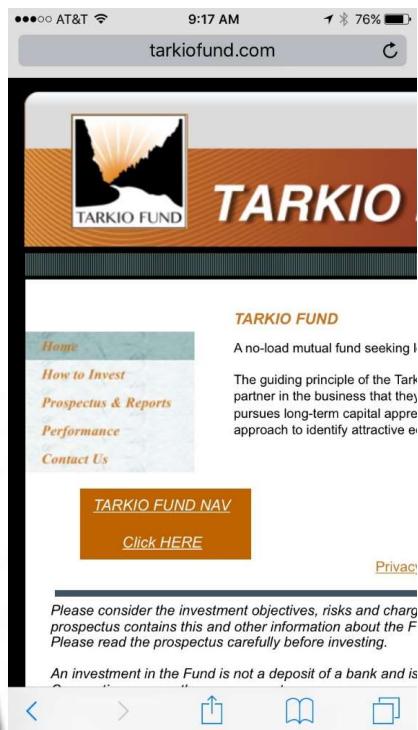
» Show resources



Learn more about mobile-friendly pages

If you're interested in learning more about mobile sites, check out our [Webmaster's Mobile Guide](#) or the [Principles of Site Design](#) on Web Fundamentals.

Mobile Websites: Responsive?



9:17 AM 76% tarkiofund.com

TARKIO FUND

TARKIO FUND
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9:30 AM 73% pughcapital.com

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9:50 AM 69% tcw.com

TCW

When Will Fundamentals Matter Again?

CLIENT SOLUTIONS
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Consultants
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Pensions
Individual Investors

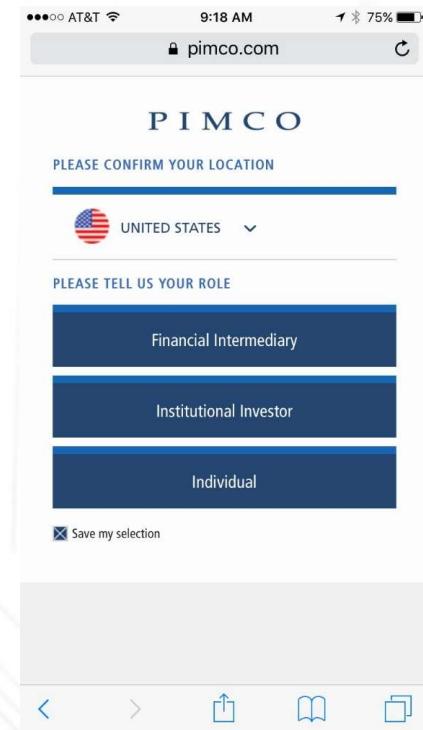
FEATURED FUND
MidWest Total Return Fund

WEEKEND READER
Equity Market Reactions, Pending Votes in Disclosure Votes

TCW IN THE NEWS
TCW Funds appointed to the Board of the FDIC
TCW Funds' Vice Chairman of the Board, Michael J. O'Leary, and President, Brian P. Park, were recently appointed to the Board of the FDIC

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9:18 AM 75% pimco.com

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PLEASE TELL US YOUR ROLE

Financial Intermediary **Institutional Investor** **Individual**

Save my selection

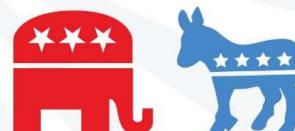
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 HOW THE ELECTION COULD CHANGE THE ECONOMY

With U.S. government spending representing about one fifth of GDP, a new president can have a significant impact on economic activity.



The election and the economy

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 Putnam FundVisualizer[®]  New feature! Import fund data from your spreadsheets.

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 TED LIGETY & U.S. SKI AND SNOWBOARD ASSOC.

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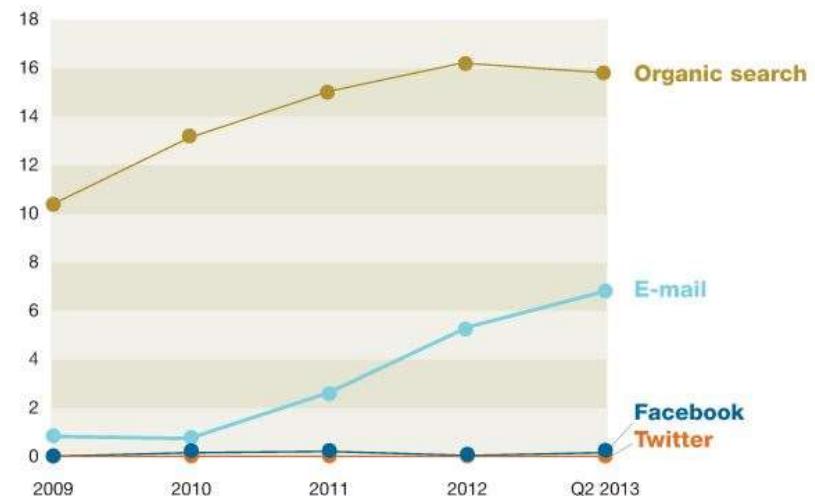
Email Marketing. A Glimpse.

- **By 2018, 8 in 10 email users will likely access their email accounts exclusively from their mobile devices.**
- **Mobile email opens have grown by 180% in the last three years.**

Source: Impactbnd. <https://www.impactbnd.com/blog/mobile-marketing-statistics-for-2016>

E-mail is still a significantly more effective way to acquire customers than social media.

US customer-acquisition growth by channel,
% of customers acquired



Source: Custora, *E-Commerce Customer Acquisition Snapshot*, 2013; McKinsey iConsumer survey, 2012

Email Marketing Tips

- Be as concise as possible in both design and content
- Use a single column template
- Use a single, clear call to action
- Avoid tiny fonts
- Take it easy on images
- Use a template

• Source: Constant Contact, 5 Simple Tips for Mobile-Friendly Emails, <https://blogs.constantcontact.com/mobile-friendly-emails/>.

Most emails are opened on mobile devices

According to more than 1 billion email opens each month tracked by Litmus' Email Analytics



Email Marketing: (font) Size Matters

From: **MFWire Neil Anderson**

To: **Tucker Slosburg** Hide

MFWire AM Alert: Don't Email John Rogers

Today at 5:28 AM

The MFWire

AM Edition
YESTERDAY, NOVEMBER 02, 2018

Funds Found Blog

- Don't Email John Rogers

Revers highlights the Artis CEO's communications preferences. [Read more](#)

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- 2018 PM&CH Annual Conference, Nov. 8-9
- 13th Annual Expert Metrics Wine & Beverage Conference Nov. 12-13
- 2018 Cybersecurity Finance Nov. 10-11
- InnovateHealth Women's Award Summit Nov. 10-12

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FA News: Nick Murray On Championing Liberty And The Free Market

Today at 10:40 AM

A Financial Advisor Magazine E-Newsletter

FA News

November 2, 2016

Nick Murray On Championing Liberty And The Free Market

Murray recommends this book when asked for one introduction to free-market capitalism.

The Economics Of Online Dating

Men and women prefer high-income partners, but economists and advisors say another data point should be reviewed.

Smart Beta Strategies Are No Sure Thing

The strategies' performance is unpredictable and varies greatly from year to year, says

••••• AT&T 9:47 AM 1 70% 

Attending Morningstar?

We invite you to meet Eric Schoenstein of Jensen Investment Management at the Morningstar conference.

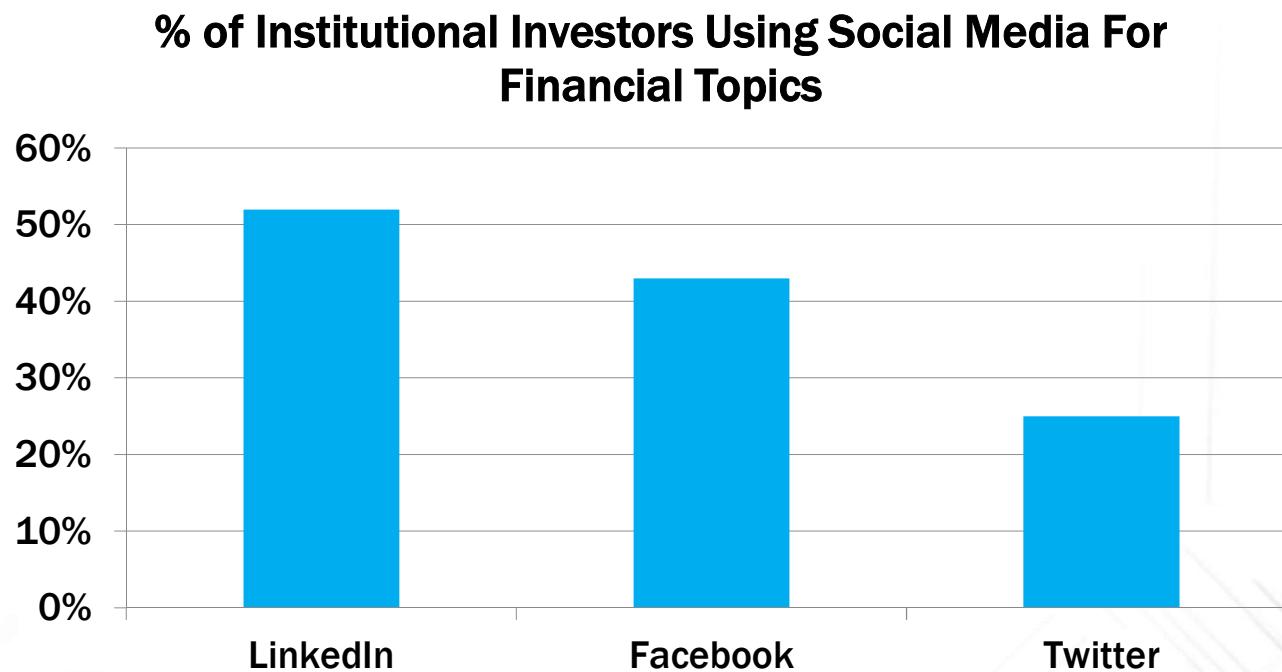
Meet the Manager Event - Eric Schoenstein,
Managing Director, Portfolio Manager

Hyatt McCormick Place Hotel
Tuesday, June 14, 2016
Sessions: 7:30 am - 3:30 pm

*Eric will be accepting 30 minute meetings during the session times listed above. **Space is limited.**

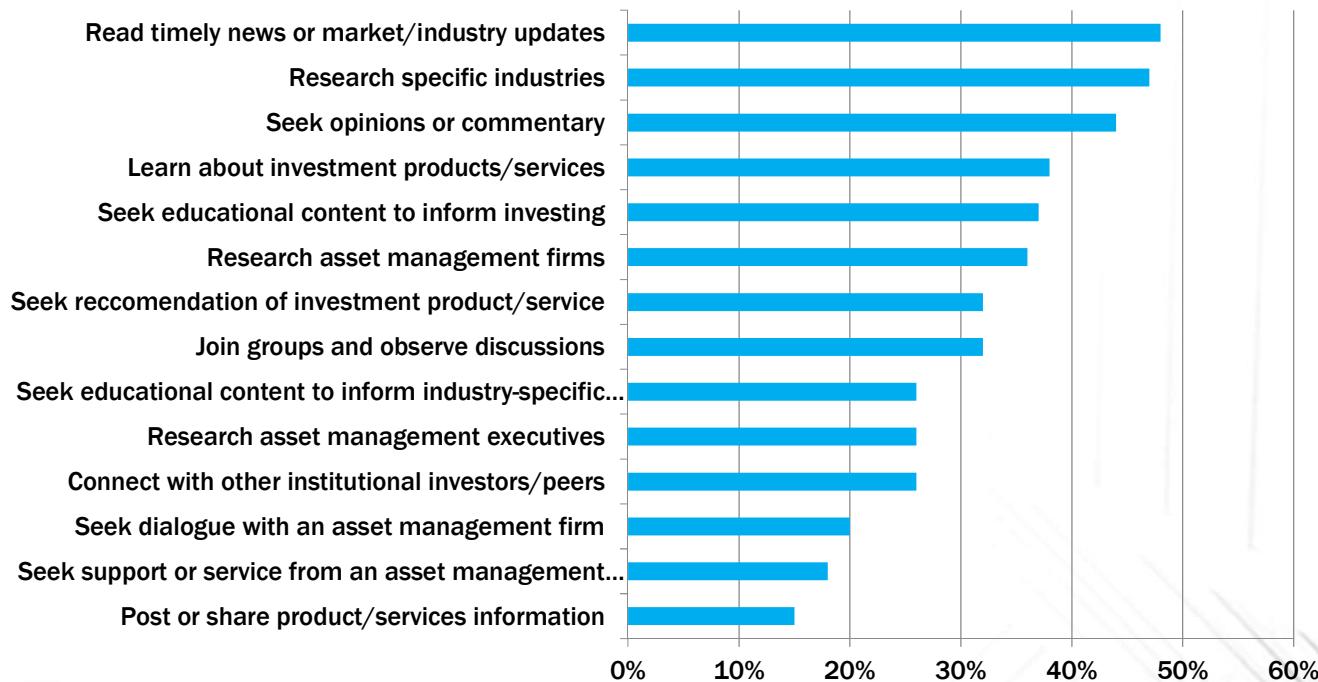
To RSVP for your meeting please email [**jshepherd@jenseninvestment.com**](mailto:jshepherd@jenseninvestment.com)

Are Investors Using Social Media?



Source: Greenwich Associates. *Institutional Investing in the Digital Age: How Social Media Informs and Shapes the Investing Process.*

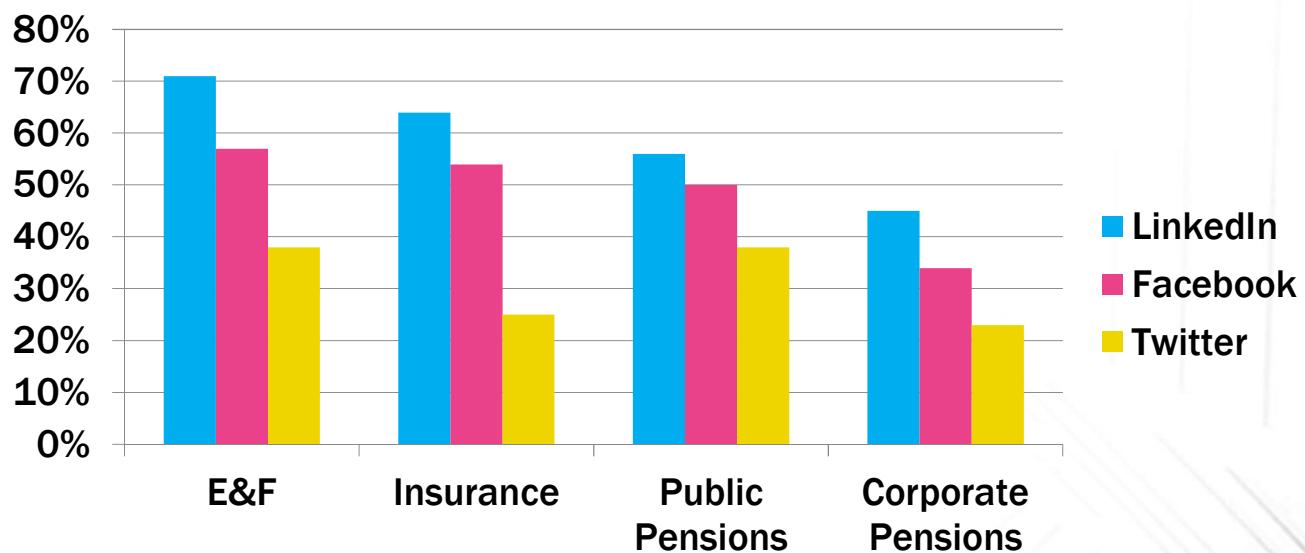
Why Do Investors Use Social Media?



Source: Greenwich Associates. *Institutional Investing in the Digital Age: How Social Media Informs and Shapes the Investing Process.*

Who Are The Investors?

"At Least Monthly" Users Of Social Media For Financial Topics By Institution Type



Source: Greenwich Associates. *Institutional Investing in the Digital Age: How Social Media Informs and Shapes the Investing Process.*

Which Managers Are Optimizing Their LinkedIn Presence?



Using Rich Media

The image shows two LinkedIn company pages. The top section is for Franklin Templeton Investments, featuring a large portrait of Benjamin Franklin and the text "FRANKLIN TEMPLETON INVESTMENTS" with the tagline "< GAIN FROM OUR PERSPECTIVE >". The bottom section is for Pioneer Investments, showing a sailboat on the water with the text "Pioneer Investments" and "PIONEER Investments". Both pages include "Home" and "Careers" navigation links and a "Now you social net" call-to-action.

Using Showcase

The image shows a LinkedIn Showcase Pages section for Fidelity Investments. It displays four sub-pages: "BNP Paribas Investment Partners Showcase Pages", "Parvest", "Fidelity Investments Showcase Pages", and "Fidelity Institutional Wealth Services". Each sub-page includes a thumbnail, company name, industry, employee count, follower count (e.g., 377 followers), and a "Follow" button.

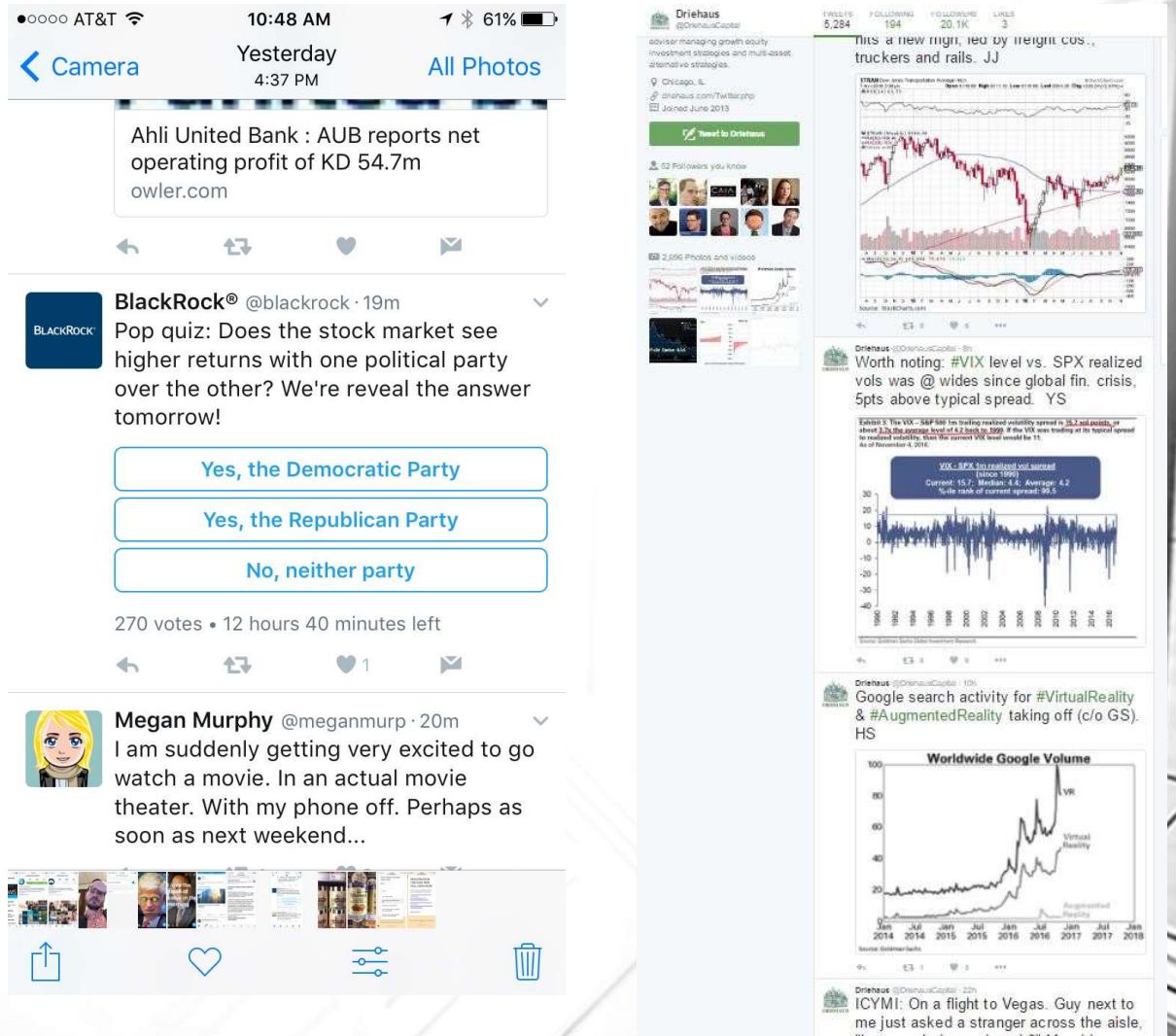
Using Own Content

The image shows three LinkedIn company pages. The top section is for Baring Asset Management, featuring a portrait of a child and the text "Baring back". The middle section is for Citadel LLC, showing a city skyline and the text "Recent College Graduates GREAT PLACE TO WORK 2016 Best Workplaces". The bottom section is for Citadel Securities, also showing a city skyline and the same "GREAT PLACE TO WORK" badge. All three pages include "Home" and "Careers" navigation links and a "Now you social net" call-to-action.

Source: Kurtosys. Social Media for Asset Managers Series: LinkedIn, April 23, 2015

Twitter. Do I Have To?

- Requires planning
- Time consumer
- Great for PR
- Charts are your friend
- Make friends with Compliance



Public Relations in Social Media



Kelly Evans (@Kelly_Evans)

TWEETS 21.5K FOLLOWING 965 FOLLOWERS 55K FAVORITES 5,213 LISTS 2

Kelly Evans @Kelly_Evans · Sep 23
"The problem is 28-year-olds are behaving like 60-year-olds getting ready to retire!" - Bill Smead @CNBC

Kelly Evans @Kelly_Evans · Sep 23
"28-year-olds have the best balance sheets that 28-year-olds have had in forty or fifty years." -Bill Smead @CNBC



Marc Andreessen (@pmarca)

TWEETS 69.2K FOLLOWING 5,159 FOLLOWERS 407K FAVORITES 180K LISTS 26

Marc Andreessen retweeted

Kelly Evans @Kelly_Evans · Sep 23
"28-year-olds have the best balance sheets that 28-year-olds have had in forty or fifty years." -Bill Smead @CNBC

The Most Influential Managers on Twitter

Top 20	
Deutschse Bank	Allianz
Goldman Sachs	New York Life
Wells Fargo	Citi
Morgan Stanley	CBRE
Credit Suisse	J.P. Morgan
UBS	DWS Investments
Merrill Lynch	USAA
Prudential	State Street
The Hartford	BlackRock
Putnam Investments	BMO

Source: Kurtosys Power 100: The Most Influential Asset Managers on Twitter.

How are they doing it?

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Stay Connected



Untested Social Media

A screenshot of a mobile Instagram profile for 'putnaminvestments'. The profile picture is a blue circle with a white scale icon. The bio reads: 'Putnam Investments. Funds distributed by Putnam Retail Management. Download a prospectus: http://bit.ly/1sGkJqN. For disclosure go to https://www.putnam.com/socialmedia/. www.putnam.com/' with 124 posts, 492 followers, and 14 following. The feed shows a grid of 12 posts, including images of office employees, a Halloween-themed photo, and a golf tournament. The bottom navigation bar includes icons for Home, Search, Camera, Heart, and Profile.

Instagram

- Few Asset Managers
- Compliance Concerns
- ROI?

- But why not a pic of the office?
- A pic of a chart you like?

A screenshot of a mobile Instagram profile for 'betterment_com'. The profile picture is a blue circle with a white clock icon. The bio reads: 'Betterment is an SEC-registered automated investment service in New York, NY. http://bit.ly/BettermentDisclosures betterment.com' with 326 posts, 1,919 followers, and 80 following. The feed shows a grid of 12 posts, including images of people, a dog, and a laptop. The bottom navigation bar includes icons for Home, Search, Camera, Heart, and Profile.

How People Use Filters Now

Branded Snapchat Lenses & Facebook Filters...
Increasingly Applied by Users

Taco Bell Cinco de Mayo Lens
224MM Views on Snapchat
5/5/16



Gatorade Super Bowl Lens
165MM Views on Snapchat
2/7/16



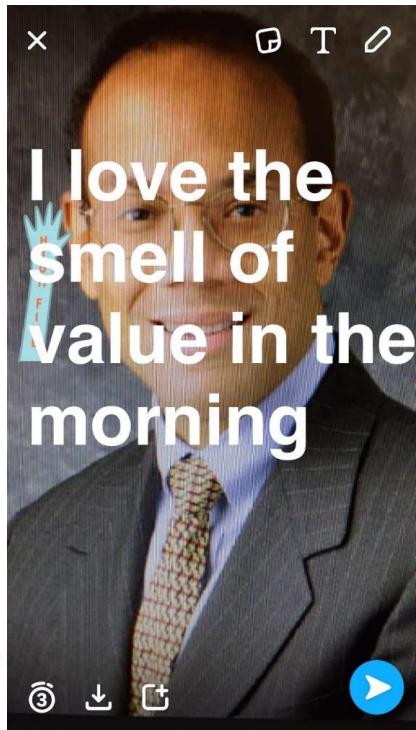
Iron Man Filter from MSQRD
8MM+ Views on Facebook
3/9/16



*Average Snapchatter Plays With Sponsored Lens for
20 Seconds*

Source: Snapchat, Facebook Time on sponsored lens excludes time taking and uploading image / video

Could Asset Managers Use Filters?



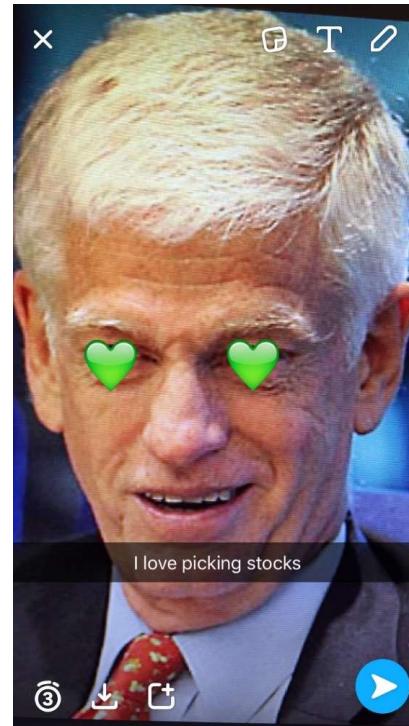
Snapchat

- Wide open
- Compliance
- ROI

Why not

- Pic of team having fun
- Goofing off before going on air

Investors want to feel part of the club.



ROI to Social Media Marketing

- Think building brand awareness AND building trust
- Three in four American consumers say social media influences their buying decisions.
- A whopping 80% of consumers are more likely to trust a company with a CEO who is active on social media.
- 78% of employees would rather work for an organization helmed by a CEO who leverages social media.

Source: <http://www.thinkadvisor.com/2016/10/19/3-powerful-benefits-financial-company-ceos-realize>

“That’s great but I gotta sell this back in the home office, so throw me a bone.”

- **Mobile responsive website**
 - Test it
 - If fail, fix it—worth the cost:
 - According to McKinsey & Co: Google says 61% of users are unlikely to return to a mobile site they had trouble accessing and 40% visit a competitor’s site instead.
- **Mobile responsive emails/newsletters**
 - Find a template
 - Test font
 - Be selective on images
- **Targeted use of social media**
 - Start with LinkedIn
 - Feed with content you already generate
 - Test run other platforms

Questions?

Contact:

Tucker Slosburg

206.652.3206

tslosburg@lyceusgroup.com