

A one stop day of networking and developing the essentials for effective investment marketing

The Fund Marketing Induction is a one-day course designed to provide an overview of the fund management industry. The structured day will provide those new to the industry, or in need of a refresher, an insight into the market, the products and the client base with a focus on the marketing and communications mix.

Fully endorsed by the Chartered Institute of Marketing, the day is arranged as an intimate learning experience. In a small learning group, you will learn and discuss 'need-to-know' aspects of the market, regulation, distribution channels and marketing strategies. As well as training and development, the course also provides an instant peer group of fellow practitioners within our industry.

The Fund Marketing Induction is an essential one-day learning experience to fast-track team members in becoming more effective in their marketing roles.

The FM Induction is designed for:

New starters and
entry level
marketers

Those moving in
to marketing from
other departments

People needing
a refresher on
the basics of our
industry

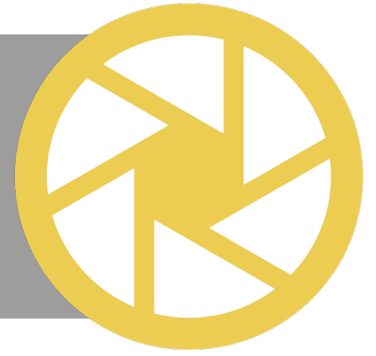
What you get:

A solid understanding
of the asset management
industry including
product types, asset
classes and sectors

An understanding
of the distribution
landscape, the
different client types,
behaviours and inter-
relationships

An overview of
the competitive
landscape, regulation
and marketing
channels

Register via our website fundmarketingnetwork.com or
email hello@fundmarketingnetwork.com



Key benefits

- Get up to speed with the industry and relevant trends in just one day out of the office
- Small group to boost learning and interactivity
- Building confidence and a solid knowledge base

What previous attendees say:

"The overview was invaluable to me. The whole day was really interesting and engaging."

Wellington Management

"Interesting content, good amount of engagement, clear and concise."

Evenlode Investments

"Extremely informative, engaging real life examples to make sense of the topic."

Liontrust

"Intimate one day learning experience and covered all I wanted to know!"

Savills Investment Management

Cost

- £850 plus VAT
- Discount available for multiple bookings and for businesses already subscribed to the Fund Marketing Network

Three month's free membership of the Fund Marketing Network

Learning and networking opportunities don't stop at the end of the day's course. Attendance also entitles you to three months of complimentary membership to the Premium Fund Marketing Network, an online community and interactive portal for marketers within asset management.

Course venue (London) & date

- 28 Queen Street, London, EC4R 1BB
- 18th October, 10:00 - 4:30pm

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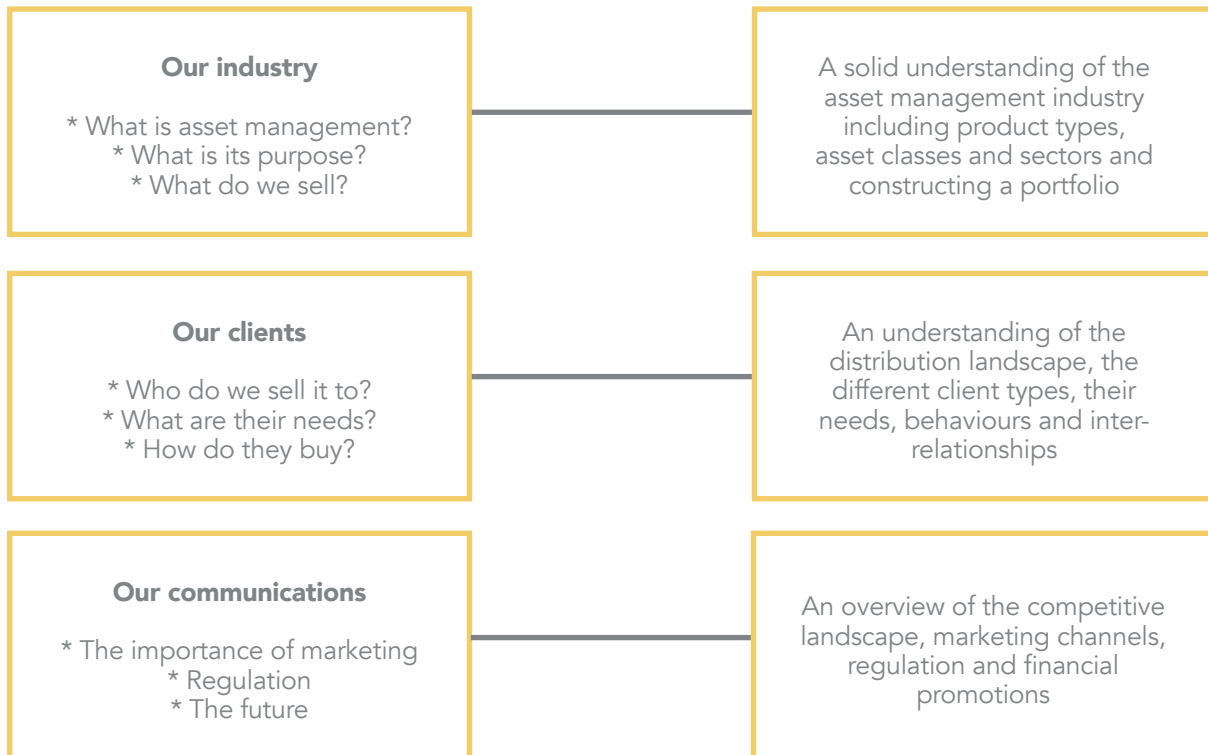
FUND
MARKETING
INDUCTION

The FM Induction content:

The Fund Marketing Induction day is structured into three sections beginning, in the morning, with a broad overview of the industry. During the afternoon delegates will cover clients and communications. Within each of the three sections there is a structure of presentation and workshop activities alongside time for networking with other attendees. Within each of the topics covered there are individually outlined learning outcomes and key take-aways.

Topics covered:

Learning outcomes:



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Our industry

- * Why is there an investment market?
- * Investment funds - unitised investment products
- * The flow of capital
- * Who are the 'decision makers'?
- * Fund or asset management industry
- * Main asset classes
- * What is 'Risk'?
- * Asset class: Cash
- * Asset class: Bonds, Equities, Alternatives - Property and Commodities
- * Risk vs. returns - the last 20 years
- * Fund sectors - making sense of the choice of funds
- * Managing a diverse portfolio

Key take-aways

- * Funds are investment products that invest in different asset classes - Cash, Bonds, Equities, Alternatives
- * Each asset class has a different risk and return profile
- * These are mixed together to provide different target outcomes
- * Importance of diversification
- * Past performance is no guide to future potential

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Our clients

- * Breakdown of aggregate total wealth in the UK
- * How big is the retail market?
- * Retail fund flows
- * Core markets
- * Consumers: ways of owning funds, what are their needs?
- * Where is the money coming from?
- * UK investor base
- * Active vs. Passive - what are they? What's changing? Massive shift to passive products
- * Outsourcing and solution
- * UK distribution market today
- * European markets: each market has a different distribution mix
- * What is the opportunity across the different markets? What are they investing?
- * What can we learn from other markets?

Key take-aways

- * Different types of client, and many layers of intermediation
- * Massive increase in passive investment
- * The rise in investment outsourcing due to complexity and reulgation
- * Increase in investment solutions focused on risk appetite
- * Relationship between customer and manufacturer (fund provider) is increasingly more distant
- * Complex network of inter-relationships and influences
- * Very different distribution channel mix across the different markets

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Our communications

- * The importance of marketing: competitive landscape
- * What's the job or marketing
- * Typical fund marketing tool kit
- * Marketing in practice

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Regulation

- * Implications of regulation
- * What is a financial promotion?
- * Content and search, educational content
- * Key rules to bear in mind, TCF

Key take-aways

- * Increasing costs for AM at the same time as margins being driven down
- * Many firms, including Global Financial Institutions (GFIs) use buy lists from which Advisers can select funds
- * Many Advisers outsource fund selection to DFM's
- * Increased use of rating agencies to help fine tune and justify advice

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