

## Ultimus Distribution Program

The distribution landscape is perpetually evolving. In order for advisers to keep up with the complexity and changes in the distribution arena, having access to resources that are accurate, valuable, and timely is essential. Ultimus Fund Solutions' exclusive Distribution Advantage Program covers key aspects for successful fund distribution planning. This program consists of 5 primary components and is made available to new and experienced advisers through various interactive channels.



Consultations



Website



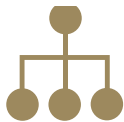
Webinars



Resource Marketplace



Shared Conferences



### Platforms, Channels and Pricing

- Supermarkets/Clearing
- Wirehouses
- Independent Broker/Dealers



### Software Programs and Databases

- Sales Reporting - understanding costs, purpose and how to incorporate
- Determining best options for technology acquisition or outsourcing
- Balancing cost and functionality



### Industry Conferences and Organizations

- Suggesting conferences to attend
- Identifying the appropriate industry organizations
- Maximizing participation and benefits of engagement



### Marketing and PR Considerations

- Marketing essentials checklist
- Public relations best practices
- Directory of suitable firms

**Contact us today to learn how Ultimus can support your distribution plans.  
 Call 513.587.3400 or email [kguerrete@ultimusfundsolutions.com](mailto:kguerrete@ultimusfundsolutions.com)**