

ULTIMUS DISTRIBUTION ADVANTAGE 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 Events



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 Kevin Guerette at kguerette@ultimusfundsolutions.com or your relationship manager.

Ultimus Fund Solutions provides fund distribution services through its affiliated broker-dealers: Ultimus Fund Distributors, LLC, Unified Financial Securities, LLC, and Northern Lights Distributors, LLC. Each of which is a registered broker-dealer and member of FINRA.