

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



Resource Marketplace



Website



Shared Events



Webinars



NEW UDA Client Forum

- Connect with fund peers in this online discussion venue
- Exchange ideas and best practices
- Ask questions and get answers regarding fund distribution



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.

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