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Ultimus Launches New Distribution Advantage Program

Leveraging Years of Experience

CINCINNATI, OHIO - April 10, 2017- [Ultimus Fund Solutions®, LLC](#) (Ultimus®), one of the largest independent providers of mutual fund, pooled investment and middle office services, today announces the launch of the Distribution Advantage Program. Available exclusively to clients, the Distribution Advantage Program focuses on providing accurate, valuable, and timely mutual fund distribution information and insights to assist asset managers in determining and executing on their distribution strategy. The program concentrates on three main aspects of Ultimus distribution curriculum, digitizing the Ultimus Distribution Playbook into the Ultimus Distribution Advantage website, creating the Ultimus Distribution webinar series, and continuing the Ultimus Distribution consultation business.

The new Distribution Advantage website site will provide familiar information, as well as new features, and allows for quicker updating which provides clients with more timely information. So like the Distribution Playbook, the website contains pertinent distribution information for a multitude of intermediaries, including the minimum channel or platform requirements. Then, to assist clients in connecting to industry business partners that can help ramp up their distribution and growth efforts, the site also includes a recommended listing of assorted distribution resources. For the convenience of Ultimus clients and to assist them with pertinent industry networking opportunities, the site also contains a current web event calendar with details regarding various industry conferences suited for mutual fund firms, and upcoming educational Ultimus webinars.

Ultimus has introduced an interactive portion to the distribution program this year with regularly scheduled distribution related webinars available exclusively to Ultimus clients. Each webinar will be led by Ultimus Director of Distribution Strategies, [Kevin Guerette](#), a nearly 20 year industry professional. Various industry experts, serving as subject matter experts, will join Guerette in the webinars. A schedule of monthly webinars is available at the new website. These webinars will cover distribution related topics for the benefit of client's product and distribution efforts. Topics include the impact of DOL, marketing and PR best practices for mutual funds, virtual wholesaling, and third party marketing.

The Distribution Advantage Program centers on the legacy aspect of one-on-one consultations with Guerette, who joined Ultimus in 2013 and engages clients in an effort to help grow their funds. He leads the Ultimus distribution team, servicing clients by facilitating the establishment of relationships and negotiating agreements with brokerage firms and intermediaries. Kevin and team also offer product analysis and fund development advice for clients, presenting

professional guidance related to the appropriate fund products, investment strategies, share classes, target market, performance goals and distribution options.

“Enhancing this distribution program not only adds value to our client services, but ultimately helps our clients reach their goals,” said [Bob Dorsey](#), CEO and Managing Director of Ultimus. “With industry trends constantly evolving the new Distribution Advantage program will provide a much needed resource for clients wanting to grow assets and keeping them up to date with critical distribution information.”

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About Ultimus Fund Solutions

Ultimus Fund Solutions provides highly customized and comprehensive middle and back office services to midsize and smaller investment advisors. Ultimus offers service solutions for mutual funds, including fund organization, fund administration, fund accounting, transfer agent and distribution services for both open- and closed-end funds, plus turnkey solutions for collective investment trusts.

Ultimus’ middle office service solution for separately managed accounts and private funds encompasses managing the technology infrastructure and operations to manufacture the data, enabling delivery of detailed reporting to advisors, investors, and regulators. Ultimus’ comprehensive services are performed by teams of accountants, attorneys, paralegals and other professionals with a wealth of financial services experience. For more information, visit www.ultimusfundsolutions.com.