



Helford Capital Partners LLP

Multi-tier Marketing Packages

For Asset Managers who are:

Start Up

Emerging

Developing

Phase Targeted Marketing and Distribution packages designed
to assist in asset growth



Helford Capital Partners LLP Our Multi-tier Marketing Solution The Two Aims

Remember - Hope is Not a Solution

When raising assets for your fund, you have two ultimate aims,
which outweigh everything else:

- (1) Raise investment for your fund
- (2) Preserve that investment within your fund

Show us a manager who believes that because they have good performance numbers,
investors will find them, and we'll show you a firm with underwhelming AUM.

Marketing is not a luxury, it is an essential

As an asset manager you operate in an incredibly competitive marketplace, and keeping up
and standing out within the market needs a strategic, integrated and consistent approach.



Helford Capital Partners LLP Our Multi-tier Marketing Solution What is it?

Helford's Marketing Solutions

- We are highly experienced professionals with a long track record of success. One of the foundations of our business is our commitment to effectively guide our clients through the new business pipeline.
- Using Helford's Multi-tier Marketing Solution means you fast track to an integrated and regular programme of marketing activity. We have well practised expertise in starting up projects; growing AUM, and building successful management firms which means that as your outsourced marketing partner,
- We are well geared to meet your marketing needs on demand.



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Our Multi-tier Marketing Solution

A three stage solution

- As a fund grows, so it will require different levels of investor communication, as well as an increasing level of investor relationship management.
- Through our Multi-tier Marketing Solution we make a commitment to equip and empower asset managers to grow and develop, building turnkey solutions that are staged to match your firms growth with your investor communication and information service requirements.
- Our solutions are designed around the three stages of a firms development

(1st) - You start

(2nd) - You grow

(3rd) - You build



Helford Capital Partners LLP Our Multi-tier Marketing Solution Investor Universe

Our investor contacts

- We maintain our database of professional investors through daily professional interaction, networking, and working to deepen our relationship with consultants, institutional investors, wealth managers, fund managers, and other professionals involved in the investment industry such as the media.
- We leverage our industry knowledge, contacts, and marketing and sales acumen on behalf of a limited number of clients, getting them access to investment decision makers.



Helford Capital Partners LLP Our Multi-tier Marketing Solution A three Stage solution

What Our Multi-tier Marketing Solutions Deliver

- With our Basic Package: We establish a distribution list, Contact target prospects, set-up initial meetings, Maintain the distribution list, continue prospects meetings and direct prospect follow-up.
- We leverage our industry knowledge, contacts, and marketing and sales acumen on behalf of a limited number of clients, getting them access to investment decision makers.



Helford Capital Partners LLP Our Multi-tier Marketing Solution Stage 1: The Basic Package

What you get in the Basic Package

- Distribution of all marketing and sales materials to more than 2,500 individual & professional, 'trigger pullers' on our contact database.
- Contact target prospects, set-up initial meetings, continue prospect meetings and direct prospect follow-up.
- Schedule visits at manager's or prospects' offices and participate in final presentations.
- Detailed sales tracking reports & analytics delivered to you monthly
- Monthly meeting with Helford's marketing representatives at our offices.



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Our Multi-tier Marketing Solution

Stage 2: The Advanced Package

- Distribution of all marketing and sales materials to more than 2,500 individual & professional, 'trigger pullers' on our contact database.
- Contact target prospects, set-up initial meetings, continue prospect meetings and direct prospect follow-up.
- Schedule visits at manager's or prospects' offices and participate in final presentations.
- Monthly meeting with Helford's marketing representatives at our offices.
- Assistance in the creation and distribution of all marketing and sales materials
- Assistance in creating, editing and designing websites
- Assistance in the completion of RFPs and questionnaires
- Population and updating of leading industry databases
- Detailed sales tracking reports & analytics delivered to you monthly



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Our Multi-tier Marketing Solution

Stage 3: The Total Cover Package

- Distribution of all marketing and sales materials to more than 2,500 individual & professional, 'trigger pullers' on our contact database.
- Contact target prospects, set-up initial meetings, continue prospect meetings and direct prospect follow-up.
- Schedule visits at manager's or prospects' offices and participate in final presentations.
- Monthly meeting with Helford's marketing representatives at our offices.
- Assistance in the creation and distribution of all marketing and sales materials
- Assistance in creating, editing and designing websites
- Assistance in the completion of RFPs and questionnaires
- Population and updating of leading industry databases
- Detailed sales tracking reports & analytics delivered to you monthly
- Management of investor relations and communications
- Management of communications with media (both social and traditional)
- Sales training and development for managers
- Events Management



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Our Multi-tier Marketing Solution

A flexible service developed to meet the needs of our clients, by giving visibility to your brand, and increasing your AUM

Why you get the best value from your marketing budget through outsourcing to our multi-tier Marketing Solutions

- Partnering with us for your marketing needs provides access to the full skill set of a well drilled team; whose strengths come from working together on many projects. A ready made team with a deep understanding of the technical and creative facets of marketing, and those members are on the same wavelength (we've set-up, built and managed our own funds), is readily put to work for your business straightaway through outsourcing.
- We rigorously manage the prospect pipeline, find the the prospects that will eventually be buyers, and eliminating those who are a poor fit for our client.
- Outsourcing your marketing is a big decision for any company. Used correctly, it can bring plenty of value by putting your organisation in expert hands. Ours.



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5 Recent Marketing & Advisory Examples

Example 1

- Fund Type: Long-Only (with hedging)
- Package type: Total Cover
- Investor Type: Intermediaries, Wealth Managers, Multi-manager, Investment consultant, Institutional Investors (Pension Funds, Endowments, Large Charities with T/O > £10 million)
- Investor Demographic: UK, Scandinavia, Germany, Luxembourg and Cyprus.
- Investment Products: Long Only Equity, 6 funds (all Dublin OEIC's)
- Time frame of mandate: from start-up to developed manager - multi year appointment.



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5 Recent Marketing & Advisory Examples

Example 2

- Fund Type: Long / Short Equity
- Package type: Advanced
- Investor Type: Intermediaries, Wealth Managers.
- Investor Demographic: UK.
- Investment Products: Long / Short Equity Cayman Domiciled
- Time frame of mandate: Emerging manager - short contract



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5 Recent Marketing & Advisory Examples

Example 3

- Fund Type: Social Impact Private Equity
- Package type: Total Cover
- Investor Type: Sophisticated investors, Intermediaries, Wealth Managers, Multi-manager, Investment consultants, Institutional investors (Endowment, Large Charities with T/O > £10 million).
- Investor Demographic: UK.
- Investment Products: Private Equity (UK Domiciled)
- Time frame of mandate: From Start-up to Emerging manager - multi year.



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5 Recent Marketing & Advisory Examples

Example 4

- Fund Type: Social Impact Bond
- Package type: Total Cover
- Investor Type: Retail & Sophisticated investors, Intermediaries, Wealth Managers, Investment consultants, Institutional investors (Endowment, Large Charities with T/O > £10 million).
- Investor Demographic: UK.
- Investment Products: Bond - un-listed - (UK Domiciled)
- Time frame of mandate: Emerging manager - multi year.



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5 Recent Marketing & Advisory Examples

Example 5

- Fund Type: FX Systematic
- Package type: Total Cover
- Investor Type: Wealth Managers, Multi-managers, Investment consultants, Institutional investors (Pension Funds).
- Investor Demographic: UK, Europe.
- Investment Products: UCITS
- Time frame of mandate: From Start-up to Emerging manager - multi year.



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