



HS Marketing, LLC

Designing Your Marketing Materials: Do's and Don'ts

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Marketing & Client Servicing for Hedge Funds

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Marketing Materials for Hedge Funds

- Print collateral
 - ◆ Pitch book
 - ◆ Summary Document(s)
 - ◆ Due Diligence Questionnaire
- Online/electronic communication
- What investors are looking for



Design: “To Do” List

1. Determine key branding concepts to develop visually
2. Establish a graphic identity at the firm and/or product level
3. Create a color palette
4. Develop template(s) for the following :
 - a) Pitch book cover (title page) and masthead design
 - b) Document masthead – for performance reports, investor letters, documents, questionnaires, etc.



Design: “To Do” List, continued

5. Make the pitch book message visual, incorporating:
 - a) Flow charts – research/investment process, organization, risk management (applies to various message elements)
 - b) Other creative formats
 - c) Performance charts and graphs
6. Use vivid colors and bold design elements
7. Integrate the message content with the design template



Design: “To Do” List, continued

8. Apply your design consistently:
 - a) Within the pitch book
 - b) Between the pitch book and other print collateral
 - c) Across all communication platforms off-line and online
9. Maintain integrity of professional design while updating presentations and refreshing content – this is critical!



Design “Don’ts”

1. **Don’t** neglect professional design capabilities for the following:
 - a) Corporate identity
 - b) Pitch books – core presentation material
 - c) Consistent application of look and feel across all collateral
2. **Don’t** overspend. “Madison Avenue” level agencies and museum quality artwork are not necessary.
3. **Don’t** get locked into design resources that cannot provide YOU with “plug and play” flexibility for updating content.



The Value of Design

- One chance to make a first impression
- Investors expect to receive high quality materials
- A professional look and feel is integral to your marketing and client service capabilities



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