

# E 5 A

INTEGRATED  
MARKETING



IT IS TIME  
TO CHANGE  
ASSET  
GATHERING

The background features a high-angle, black and white photograph of a dense city skyline, with the Empire State Building prominently visible in the center. The image is overlaid with a semi-transparent blue grid and various mathematical formulas in white and blue. The formulas include trigonometric functions like  $\sin(x)$  and  $\cos(k\Delta x)$ , exponential functions like  $e^{i\sigma\sqrt{\Delta t}}$ , and probability density functions like  $\frac{1}{\sqrt{2\pi}\sigma} e^{-\frac{(x-\mu)^2}{2\sigma^2}}$ . Other visible formulas include  $\frac{\sigma^2 \Delta t}{2\Delta x^2}$ ,  $\frac{\sigma^2}{12} \Delta t$ ,  $\frac{\sigma^4}{2}$ ,  $\frac{\Delta x \Delta t}{3}$ ,  $\frac{\sigma^2}{4}$ ,  $\frac{k^2 \Delta x^2}{6}$ ,  $\frac{\sigma^2 \Delta t}{2}$ ,  $\frac{\sigma^2 \Delta t}{4}$ ,  $\frac{\sigma^2 \Delta t}{6}$ ,  $\frac{\sigma^2 \Delta t}{8}$ ,  $\frac{\sigma^2 \Delta t}{10}$ ,  $\frac{\sigma^2 \Delta t}{12}$ ,  $\frac{\sigma^2 \Delta t}{14}$ ,  $\frac{\sigma^2 \Delta t}{16}$ ,  $\frac{\sigma^2 \Delta t}{18}$ ,  $\frac{\sigma^2 \Delta t}{20}$ ,  $\frac{\sigma^2 \Delta t}{22}$ ,  $\frac{\sigma^2 \Delta t}{24}$ ,  $\frac{\sigma^2 \Delta t}{26}$ ,  $\frac{\sigma^2 \Delta t}{28}$ ,  $\frac{\sigma^2 \Delta t}{30}$ ,  $\frac{\sigma^2 \Delta t}{32}$ ,  $\frac{\sigma^2 \Delta t}{34}$ ,  $\frac{\sigma^2 \Delta t}{36}$ ,  $\frac{\sigma^2 \Delta t}{38}$ ,  $\frac{\sigma^2 \Delta t}{40}$ ,  $\frac{\sigma^2 \Delta t}{42}$ ,  $\frac{\sigma^2 \Delta t}{44}$ ,  $\frac{\sigma^2 \Delta t}{46}$ ,  $\frac{\sigma^2 \Delta t}{48}$ ,  $\frac{\sigma^2 \Delta t}{50}$ ,  $\frac{\sigma^2 \Delta t}{52}$ ,  $\frac{\sigma^2 \Delta t}{54}$ ,  $\frac{\sigma^2 \Delta t}{56}$ ,  $\frac{\sigma^2 \Delta t}{58}$ ,  $\frac{\sigma^2 \Delta t}{60}$ ,  $\frac{\sigma^2 \Delta t}{62}$ ,  $\frac{\sigma^2 \Delta t}{64}$ ,  $\frac{\sigma^2 \Delta t}{66}$ ,  $\frac{\sigma^2 \Delta t}{68}$ ,  $\frac{\sigma^2 \Delta t}{70}$ ,  $\frac{\sigma^2 \Delta t}{72}$ ,  $\frac{\sigma^2 \Delta t}{74}$ ,  $\frac{\sigma^2 \Delta t}{76}$ ,  $\frac{\sigma^2 \Delta t}{78}$ ,  $\frac{\sigma^2 \Delta t}{80}$ ,  $\frac{\sigma^2 \Delta t}{82}$ ,  $\frac{\sigma^2 \Delta t}{84}$ ,  $\frac{\sigma^2 \Delta t}{86}$ ,  $\frac{\sigma^2 \Delta t}{88}$ ,  $\frac{\sigma^2 \Delta t}{90}$ ,  $\frac{\sigma^2 \Delta t}{92}$ ,  $\frac{\sigma^2 \Delta t}{94}$ ,  $\frac{\sigma^2 \Delta t}{96}$ ,  $\frac{\sigma^2 \Delta t}{98}$ ,  $\frac{\sigma^2 \Delta t}{100}$ .



# TOUCH NEW GROUND WITHOUT BREAKING IT.

Clients come to us seeking to raise assets. As former portfolio managers, we begin by asking a lot of questions.

What channel? Big institutions, small institutions, family offices, financial advisors, qualified investors, accredited investors, mass affluent, employee populations, etc?

With much of the industry guided by consultants, analysts and other gatekeepers, we need to uncover the compelling reasons to allocate to your investment strategy and structure.

What motivates investors and how does your strategy or product fit into their overall portfolio? What can you tell them that is new or different?

With a full understanding of the subtleties of the nuances so important to each allocator, E5A provides the strategy, data, math, and messaging to win new allocations or bring in direct retail investments at scale.

## Marketing Planning

E5A builds institutional, advisor and UHNW acquisition programs that are laser targeted, and retail campaigns at scale. Strategy, data targeting, impactful creative, and flawless execution are our proven process that heightens the probability of success in new asset acquisition.

## Predictive Analytics

E5A was built on an equity multifactor model. We leverage a similar mathematical methodology using touch-point predictive analytics, through which we design the precision process to target and acquire investors. E5A's analytics continually optimize these touch-points, increasing its effectiveness.

## Build Sustainable Brand Equity

E5A ensures its clients build strong positioning and messaging refined and nuanced for each channel. Own your niche. Efficiently and effectively expand your universe of investors.

## Leverage is Appropriate

With firsthand portfolio management, asset gathering, marketing and advertising experience, E5A understands investment process and distribution. There is no time wasted getting us up to speed. We have deep expertise in institutional, financial advisor and direct to HNW acquisition and AUM gathering. Asset gathering and building brands is our business.

Currently, the JOBS Act is a rare choice for our clients. There are many, highly compliant methods to gain new prospects and allocations without challenging regulators, the media or raising the eyebrows of the industry.

The maximum leverage you can apply is through E5A's expertise.



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# E5A INTEGRATED MARKETING BUILDS STRONG REPUTATIONS WHILE DRIVING ASSET GROWTH.

## Professional Allocators

Our work closely matches the channel(s) you have selected to market. We can identify which institutions, consultants, financial advisors or other professional investors are interested in allocating to your strategy. Our deliverable is simply a spreadsheet of highly qualified leads for your sales team or wholesalers. How do we know who is qualified? By measuring their behavior. Digital media allows us to measure who is engaging with your content and “scoring” high enough to be worth an in-person visit.

## Direct Investors

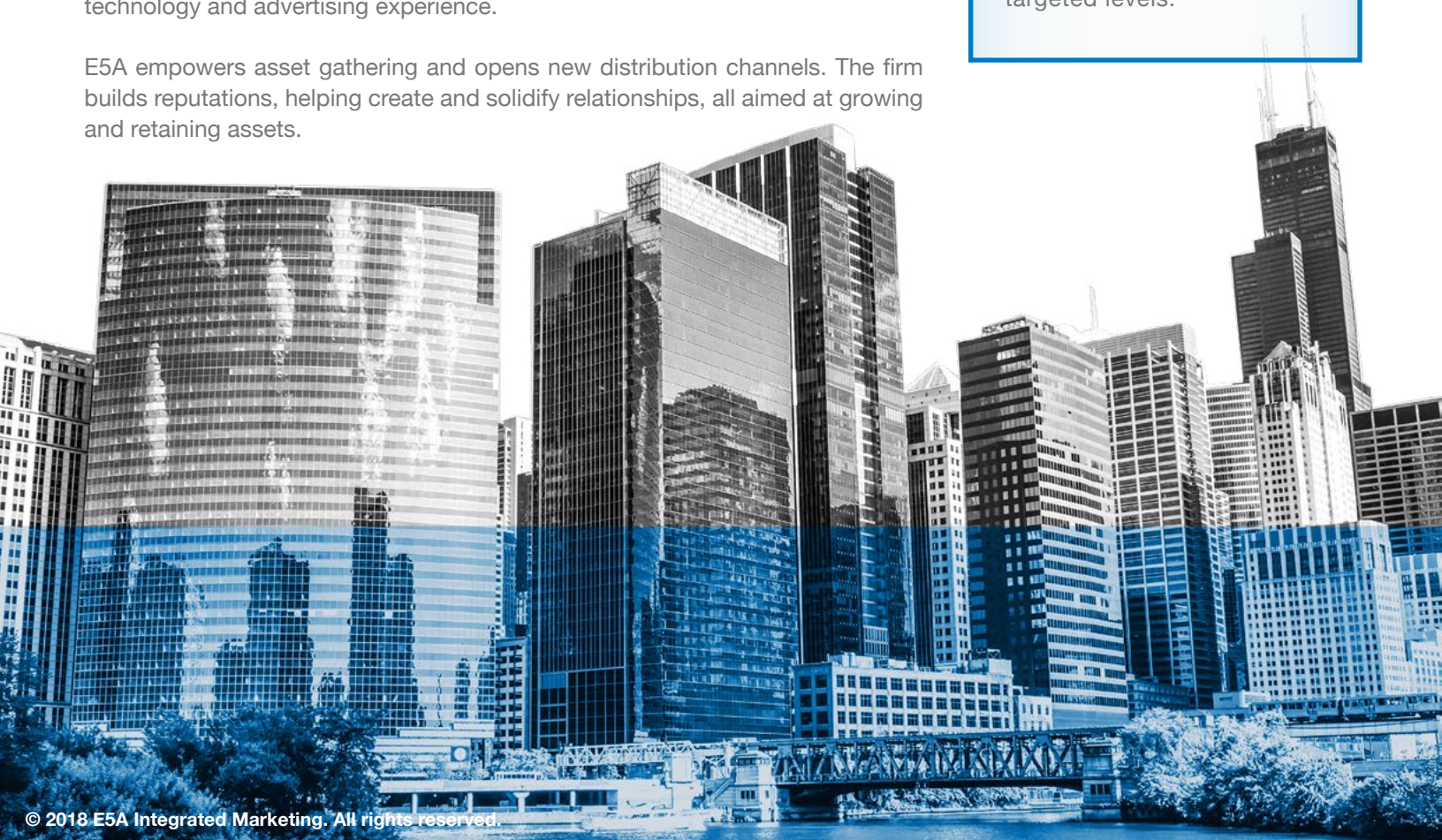
Our deliverable with self-directed investors is assets under management. Our process creates sub-segments of investors to laser target and close. We develop outreach programs, build conviction through thought-provoking content and measurement systems to accurately attribute our efforts to new assets.

E5A works closely with managers to balance the science and art of marketing to optimize every marketing dollar invested. E5A is led by accomplished senior executives with vast portfolio management, asset raising, distribution, marketing, technology and advertising experience.

E5A empowers asset gathering and opens new distribution channels. The firm builds reputations, helping create and solidify relationships, all aimed at growing and retaining assets.

## Predictive Analytics

E5A leverages a mathematical methodology and touch-point predictive analytics, through which we design the precision process to target and acquire appropriate investors. E5A's analytics continually optimize these touch-points, increasing its efficiency. The firm has created models covering institutions, the advisor channel, accredited and mass affluent investors. This science is effective and highly efficient at increasing AUM to targeted levels.





# UNDERSTANDING ASSET OWNERS AND THEIR CONSULTANTS

Many firms are focused on adding technology and increasing their focus on the investment process while marketing and sales support are moving at a slower pace.

E5A represents best practices in modern proven digital strategies and scalable processes to asset gathering and investor relations.

Today, managers can efficiently create targeted awareness, esteem and consideration; gain qualified leads or direct assets, and champion their strategies and investment thesis. The ease of digital engagement begins a new chapter in asset management marketing.

## Institutional

We provide the expertise to target all appropriate consultants and allocators. We acknowledge that senior managers do the final close of the allocation. E5A creates awareness and positive perception of your firm, its strategies and Thought Leadership, and most importantly, we identify which institutions are interested in allocating.

## Financial Advisors

We are able to laser target the most likely advisors to include your product in their asset allocation. Additionally, we can assist in gaining shelf space, in gaining research support at Wires and RIAs, and in firm-wide asset allocation models.

## Retail Investors

E5A parses this large group into segments including investors who have allocated to your strategy, style or structure. Targeting and messaging is nuanced and tested before scaling. Strong ROIs are achieved through disciplined testing and optimization, honed over time.

E5A is led by Andrew Corn, a former endowment investment committee member, Chief Marketing Officer and portfolio manager. He ran an institutional global long/short, an after-tax alpha strategy for family offices and subadvised a portfolio of ETFs for a wealth manager.

His experience was gained at Beacon Trust, where he was CIO-Equities, managing \$1.5 billion in assets. Beacon acquired Corn's firms Clear Asset Management, where he managed long-only and long/short strategies; and Clear Indexes, which created indices tracked by four ETFs.