



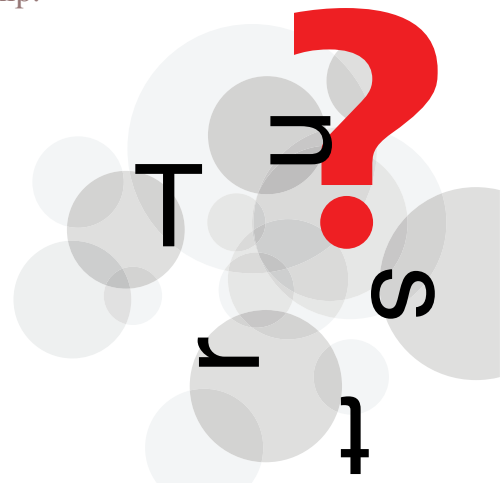
**FEBRUARY 2016**

[www.aared.com](http://www.aared.com)

For a few, now couldn't be a better time.

The investing public, institutions and HNW individuals are both fearful and hopeful. On the one hand they are shocked and distressed by the calamitous drop in their asset values a few short years ago, yet on the other they are simultaneously looking, albeit hesitantly, for a new source of trust. In a word: money is in motion.

For those firms who conduct their business with strong client attention, frank dialogue, demonstrable due diligence, disciplined investing and strong relative performance, the time to get your story out is now, right now. In fact, the telling of it could hardly be more powerful than in the present vacuum of investment leadership.



## [ WHO WE ARE ]

Now in its twenty-eighth year, aabalone[red] delivers differentiation to investment and wealth management firms — so they compete more effectively, go to market creatively, and harvest web technologies to service clients and grow their businesses.



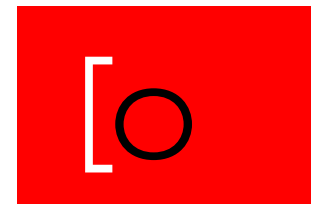
## [ WHAT MATTERS MOST ]

Naturally, our clients come first. But we view success in another way...it is our clients' success with their clients and prospects that really matters. While we understand that you come to us with certain objectives, we strive to keep an open ear and a creative eye to uncover ways for you to stand out in a competitive environment, to build your relationships and to shine in the finals.

## [ WHAT WE THINK ]

Differentiated firms carve out a favored position in the minds of prospects. Strong brands induce prospects to select your offering while providing psychological affirmations of their choices. Research indicates a number of positive benefits accrue to firms with strong brands: higher ROEs, better margins, more wins and better recruiting to name a few. In short, brand is a competitive advantage that provides an enduring and compelling compound return. Your brand is the asset we manage, so you can concentrate on the financial ones.

Everything we conceive, write and create is an original. It has to be. Properly viewed, each client is in a marketing niche of one.

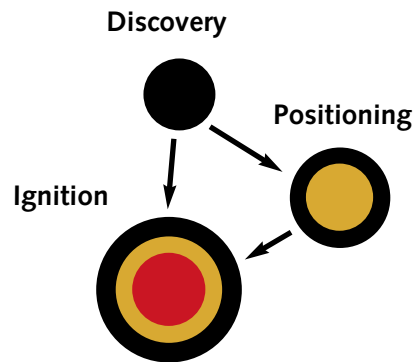


## [ HOW WE DO IT ]

Similar to many of our investment clients, we apply a process, fine-tuned by experience to transform and manage our clients' brands. Scaled to the complexity of the assignment, our process elements are: **Discovery, Positioning and Ignition.**



Each of these elements informs the other. **Discovery** brings to light strengths, weaknesses and differentiation possibilities; **Positioning** shapes



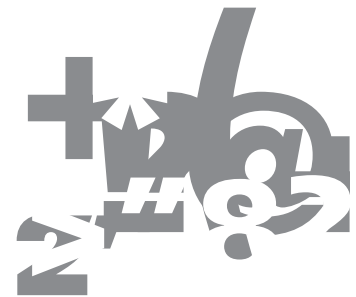
your competitive stance and message, and **Ignition** brings the message to market.

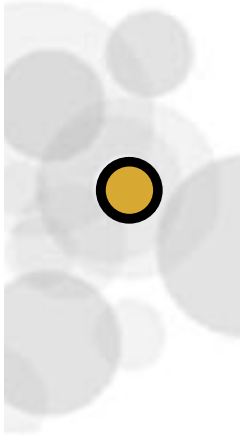
Whether a fully integrated branding campaign, an independent web assignment, or a revamp of a

PowerPoint presentation, everything we conceive and create proceeds from a strategic understanding. This intelligence powerfully fuels all Ignition.

**DISCOVERY** typically entails a thorough review of your current situation comprising secondary market research, online competitive analysis, examination of current marketing materials and sales presentations, iterative discussions with management and custom

interviews with both internal and external audiences. At the close of Discovery, our clients have in hand a “findings” document complete with market analysis, interview citations and communications recommendations.

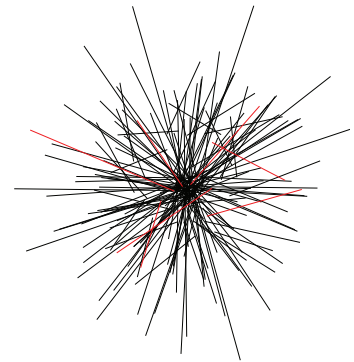




**POSITIONING** identifies the competitive space you intend to own and crystallizes your message. We deliver a “brief,” a document that serves as the foundation for all future marketing endeavors. The brief records your important branding guidelines such as positioning rationale, personality attributes, communication objectives, thematic messages, target audiences, and, if appropriate, a branding line.

Sometimes off-sites, sales seminars and company “brand launches” are held to facilitate the adoption of the repositioned brand.

**IGNITION** is where your positioning, identity, brand message and personality meet with creativity and imagination. A spectrum of potential media is examined and prioritized based on your objectives, budget and timing. Integrated communication vehicles include: corporate identity, web assets, sales presentations, white papers, corporate literature, offering memoranda, conferences and advertising.



## [ SERVICES ]

Brand strategy & positioning  
Communications planning  
Content development  
Conferences & annual meetings  
Copywriting, editing, proofing  
Corporate identity  
Corporate + product advertising  
Database design, building & programming  
Design (print, web, multimedia)  
Digital video  
Information architecture

Market research  
Pitch books  
Planning & project management  
Positioning (product, service, & corporate)  
Presentation coaching  
Production management  
Programming (server & client side)  
Signage  
Usability testing  
Web asset strategy & development  
*(internet, intranet, SEO, mobile and custom apps)*

## [ REPRESENTATIVE CLIENTS ]

### INVESTMENT & WEALTH MANAGERS

Aetos Capital  
AIG Global Investment Group  
AlphaSimplex  
Alstra Capital Management  
Canaan Partners  
Carleon Capital Partners LLC  
Citigroup Asset Management  
Fairfield, Bush & Co.  
Ferrer Freeman and Company  
FLAG Capital Management  
GE Asset Management  
GE Capital Equity Group  
Greenwich Investment Management  
Hamilton Robinson Capital Partners  
Hatteras Funds  
International Managed Care Advisors  
Investment Counselors of Maryland  
Investor AB  
John A. Levin & Co., Inc.

Nautic Partners  
Oppenheimer Capital  
Orchard Global Asset Management  
Pentegra Retirement Services  
Pitcairn Family Office  
RayLign Advisory LLC  
Raylor Investments LLC  
RBS Group  
Rockefeller & Co.  
Rogge Global Partners  
Roundtable Investment Partners  
Schroder Capital Management  
Spruce Private Investors  
The Beacon Group  
The Portfolio Group  
Tiger Management LLC  
Watermark Capital Partners, LLC  
Wood Creek Capital Management  
Zephyr Management, L.P.

## [ REPRESENTATIVE CLIENTS ] *continued*

### **CONSULTANTS**

BARRA Strategic Consulting  
Casey, Quirk & Associates  
Hewitt Associates  
Rocaton Investment Advisors  
RogersCasey

### **FINANCIAL SERVICES**

Burstream  
Citibank, N. A.  
Communicator Inc. (Bond Hub)  
Coprocess SA  
Deloitte & Touche  
GE Commercial Finance  
Louis Dreyfus  
MasterCard International  
Nelson Publications  
New York Clearing House  
Pendergast Group  
Technimetrics, Inc.

### **OTHER INDUSTRIES**

Bergamo Fabrics  
Columbia University  
Cotton Inc.  
DinghyGuru  
Healthcare Satellite  
HealthMarket  
Images.com  
MediaPost.com  
NetDocket, LLC  
Peds Products  
Prime Airborne  
SSJR  
Stamford IPA  
Tiffany & Co.  
TransNT Sports  
WhitServe LLC  
Whorlr

### **REAL ESTATE**

Global Property Advisors  
Jones Lang Wootton USA  
The Galbreath Company





## [ CONTACT US ]

aabalone[red]

6 Thorndal Circle

Darien, Connecticut 06820 USA

203 655 1920 TEL

203 655 4959 FAX

getred@aared.com EMAIL

www.aared.com

### WHY THE NAME

Because of its individuality, enduring strength and distinctive design, the abalone shell is an inspiring symbol of our brand promise. Combined with the fact that we are located in a red brick building near the Connecticut shore, it seems a natural fit. The double “a” at the front stands for our two founding partners, who’ve successfully grown the firm for 28 years. While few can actually spell our name, its quirkiness has proven memorable.

### WHY THE POSITIONING LINE

Focused squarely on providing consulting and marketing communications for asset managers in every asset class, aabalone[red] has the knowledge, methodology, and experience that ensures our clients receive an optimal return at every point along the curve.

## [ PEOPLE ]

### **Alec Wiggin, PRESIDENT**

Harvard University, AB; Columbia University, MBA

Alec is the strategic thinker at aared; he has a natural ability to see both the forest and the trees. A problem solver, Alec finds thoughtful and rational ways for clients to more effectively communicate their differences (at the delight of their clients and the expense of their competitors). Somehow Alec finds time to stay abreast of trends in the asset management industry and to educate the rest of us on the intricacies of market neutral strategies or the taxation of carried interest. Alec oversees the consulting, positioning, editorial, client management and new business services of the firm.

Formerly a vice president at Bessemer Trust Company and an assistant manager at Brown Brothers Harriman & Co., he has a deep background in finance and marketing. As long as thirteen years ago, Alec was speaking before audiences like AIMSE about the future of the web in asset management. Some of Alec's commentary has been published in *Pension & Investments* and *Plan Sponsor*.

### **Gail Wiggin, GUI IGNITION DIRECTOR**

Goucher College, BA; Post-graduate study at Radcliffe and Harvard Business School

Gail is the driving creative force and the founder of the firm. Her early days were grounded in print communication and a variety of marketing mediums for corporate accounts, but she lost her heart to the web in 1995. Since then she has honed her skills in web asset development, including information architecture, GUI and web application design, private portal implementation and social media. Tending towards the vocal, she has presented and postulated on subject areas running the gamut from Experience Design to Dot.com-Mom challenges. Our ignition director's work has been recognized nationally by organizations and publications such as Communication Arts, the American Institute of Graphic Arts, SIGGRAPH, the Art Directors Clubs of New York and Connecticut, and the Advertising Club of Los Angeles.

A graduate of Goucher College in Fine Arts and English, Gail has served on the board of the New York chapter of AIGA. While painting in Europe under a Thomas J. Watson Fellowship, her work was exhibited in the Mall Gallery, London and the Grand Palais, Paris.

### **Holly Hough, MARKETING CONSULTANT**

Skidmore College, BA

Holly's more of an analytic type who likes fresh marketing ideas that stem from research. With over fifteen years of sales and marketing experience in the consumer packaged goods arena, Holly's background includes market analysis and forecasting, managing test markets, the launch of dozens of new brands, special event and regional marketing, as well as local development and execution of national strategies.

Since 1998, Holly has been working with key asset management clients in the areas of strategic positioning, branding, web usability, project management and communications planning. She's a hard-core "multi-tasker" who likes to see the end result. In her years with The Coca-Cola Company she was responsible for growing corporate volume, market share and profits throughout the Northeast.

## [ PEOPLE ] *continued*

### **Tracy Floyd, CHIEF ENGINEER**

Coastal Carolina University, BA

Tracy heads our development team and brings something truly unique to aabalone[red] — a calm persona with a southern drawl. His background in fine arts and graphic design landed him art director positions at agencies in South Carolina, but as the world became more digital, so did Tracy. For us, he is a web strategist and hands-on, multi-lingual programmer with a passion for design, and an information architect who is user-focused and agile in development techniques.

Tracy has an uncanny ability to translate complex techno talk into everyday words so that we all understand each other. He specializes in conceptualizing, designing and implementing web assets for our clients and is especially fond of CakePHP, MySQL, JavaScript, and jQuery.

### **Nat Connacher, CREATIVE DIRECTOR**

Yale University, MFA

Nat is a combination of art and science — he has a way of combining the emotional side to creativity with a logical approach to design. Nat brings over eighteen years of corporate marketing & communications knowledge with multimedia experience including print, web, information design, social media, editing and graphical representation of complex ideas. His knowledge allows him to approach each new project with a strategic outlook that creates a unique visual dialogue between the client, their brand and their audiences.

Nat has worked on diverse branding, collateral, web and software projects for companies including Aetna, Celera Genomics, Gartner Group, IBM, Oxford Health Plans, and Pratt & Whitney. His work has been featured in Communications Arts. Nat is also actively involved in his local art community as a photographer and painter.