

# WHY *(mutual fund)* BRANDING MATTERS

## WHY IS MUTUAL FUND BRANDING SO IMPORTANT?

We get it—you're a numbers guy or gal. However, if you're out there hustling to launch a breakaway firm, new mutual fund or attract new business to your existing fund, you can't forget to take time to focus on defining your venture's branding.

Branding isn't just for big companies like McDonald's or Starbucks—it's necessary for every single business out there, no matter how large or small. It's how you tell the world and your prospective clients who you are, what you're about, and why they should care.

Our **third party marketing team** created this infographic to put branding into perspective for the mutual fund community. Like what you see? Please feel free to share!

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TOTAL MUTUAL FUND ASSETS CONTROLLED BY THE TOP 25 FUND COMPLEXES<sup>1</sup>



INVESTORS BELIEVE BRAND STRENGTH IS INCREASINGLY IMPORTANT IN GUIDING INVESTMENT DECISIONS<sup>2</sup>



*brand trust*

IS THE LEADING DRIVER OF MUTUAL FUND CONSIDERATION, EXCEEDING RELIABILITY OR PERFORMANCE<sup>3</sup>



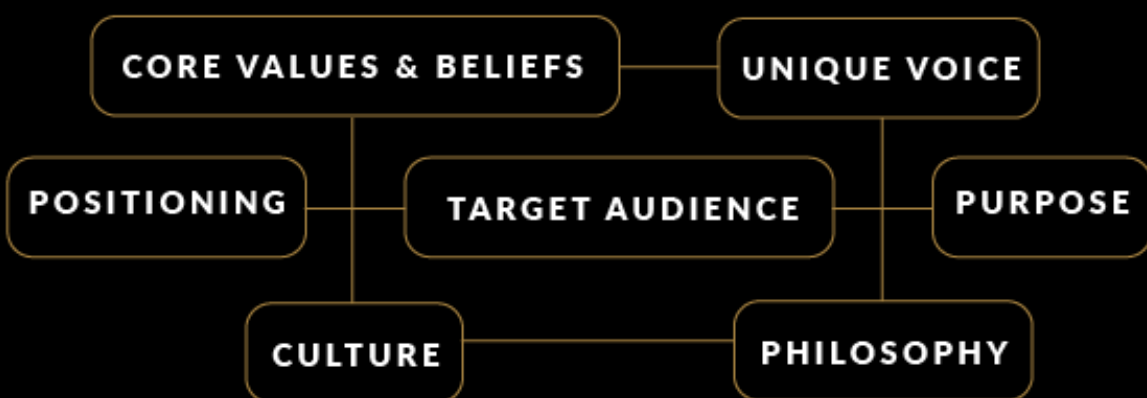
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THE TIME IT TAKES TO EVALUATE AND MAKE A DECISION ABOUT A BRAND<sup>4</sup>

## WHAT IS BRANDING? *(it's not just a cool logo)*

“ Your brand is what other people say about you when you're not in the room. ”

JEFF BEZOS



## WHY IS BRANDING IMPORTANT?

- 1 DIFFERENTIATES FROM THE CROWD
- 2 BUILDS TRUST + ADDS AUTHENTICITY
- 3 FORMS EMOTIONAL BONDS THROUGH ENGAGEMENT
- 4 REFLECTS + SPEAKS TO YOUR IDEAL INVESTOR
- 5 INTERACTS WITH TARGET MARKET TO CREATE NEW RELATIONSHIPS WHILE STRENGTHENING CURRENT

## SET YOURSELF APART FROM THE CROWD



“ People do not buy goods. They buy relations, stories, and magic ”

SETH GODIN

SOURCES:

- <sup>1</sup>Investment Company Institute, 2017 Factbook
- <sup>2</sup>Harvard Business Review, "Decision-Driven Marketing"
- <sup>3</sup>CogentWealth Report, "Advisor Brandscape"
- <sup>4</sup>ScienceDirect, "Impact of Brand on Consumer Behavior"



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50 Braintree Hill Office Park, Suite 105, Braintree, MA, 02184; T: 781-535-6083

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