

FOR IMMEDIATE RELEASE

Ultimus to be a Gold Sponsor for Boutique Mutual Funds Conference

SunStar’s Conference, “Thriving in an Ever-Changing Industry” features speakers on distribution and marketing

CINCINNATI, OHIO – APRIL 8, 2019 – Ultimus Fund Solutions® (Ultimus®), the largest independent provider of fund administration services is pleased to announce that it will be a gold sponsor for SunStar Strategic’s 2019 Conference, “Thriving in an Ever-Changing Industry.” The conference is ideal for small to medium-sized mutual fund firms who want new, actionable ideas to help them grow assets.

The conference will be held Monday and Tuesday, April 29 and 30, 2019 at the Dupont Circle Hotel in Washington D.C.



Dave Carson, VP, Director
Ultimus Fund Solutions

Dave Carson, vice president and director of client strategies at Ultimus, will moderate a panel at the event entitled Success on BD Platforms. Panelists include Ryan Tagal, director of product management for Envestnet, a leading provider of integrated portfolio, practice management, and reporting solutions to financial advisors and institutions.

“One of the many challenges in today’s environment for mutual funds is finding the right partners to distribute the products,” said Carson. “We believe a strong distribution strategy is essential for growing assets.”

Also addressing distribution from another angle will be keynote speaker Christopher Davis, head of U.S. research at Strategic Insight.

Davis will present “Distribution Essentials for Boutique Funds.” Although Strategic Insight provides data and intelligence to asset managers of all sizes, Davis will review the universe of data to determine how boutique firms can compete with the largest of funds.

Davis’ comments will address opportunities boutique firms have to distinguish themselves from the pack, avoid the race-to-the-bottom for fees, and maximize sales through multiple distribution channels.

“Ultimus has been a great partner to us over the years,” said Kathryn Morrison, CEO and president of SunStar Strategic. “They, along with our other speakers and sponsors are helping us bring together one of the best conferences in the industry for boutique fund firms, whether established or just starting up.”

Thriving in today's competitive environment is tougher than ever. To address the industry's issues, the conference will also offer panels of:

- Fund managers with assets ranging from \$120 million to \$250 billion talking about specific techniques they are using to sell their funds, covering an array of products, sales efforts and marketing structures.
- M&A experts discussing what's happening in the industry and how fund value can be estimated – whether buyers or sellers.
- Financial journalists sharing what they're looking for and what topics they find to be of interest.
- Data and digital providers demonstrating how to maximize their services for advisor outreach through smart data.

For more information, including speakers, agenda and registration, visit <https://www.sunstarstrategic.com/conference> or call 703.299.8390.

###

About Ultimus

Ultimus Fund Solutions provides a highly customized and comprehensive suite of fund administration services for investment advisers. Our high-quality services include integrated solutions that support the launching and servicing of mutual funds, hedge funds, ETFs, private equity funds, real estate funds, venture capital funds, variable annuity trusts, state-sponsored 529 plans plus the unique needs of pensions, endowments, and foundations.

Our offering comes with a deep commitment to excellence, achieved through investments in both talent and technology, with constant focus on maintaining our consultative approach and boutique service culture. Ultimus stands out as an award-winning, trusted business partner by helping investment advisers and fund families navigate and flourish in today's increasingly sophisticated and dynamic industry landscape. Ultimus' comprehensive service solutions are provided by seasoned teams of professionals with a wealth of financial services experience. For more information, visit www.ultimusfundsolutions.com.

About SunStar Strategic

SunStar Strategic offers public relations (PR) and marketing programs to help attract, maintain and grow clients. Core services include comprehensive PR, creative strategy and execution. SunStar is headquartered in Washington D.C. with additional offices in Chicago, New York City and Austin.