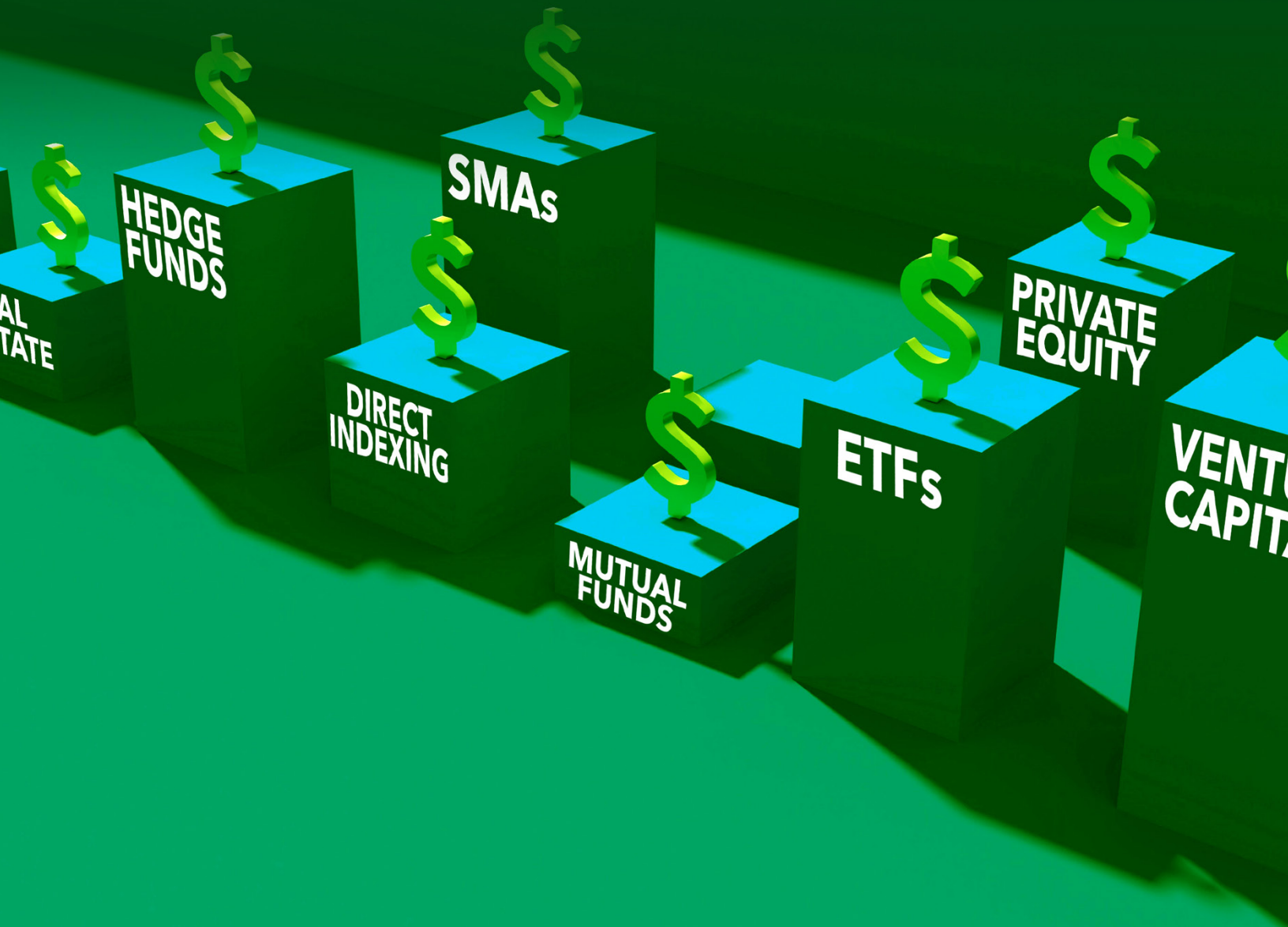


It's Time to Energize
*Asset
Gathering*



Reaching Your Asset Gathering Goals

Clients engage E5A to support raising new assets under management. We begin our repeatable, scalable, process by asking a lot of questions.

What channel(s)? Institutions, family offices, financial advisors, UHNW, HNW, mass affluent, or employee populations?

What motivates investors and how does your strategy or product fit into their overall portfolio? How large of an allocation is appropriate and what is it replacing in their portfolio? What can you tell them that is new, different, and compelling?

With a full understanding of your investment process and the subtleties 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.

Our CEO is a former active CIO, and ETF designer. His research was published 11 times in Barron's and today he contributes opinion pieces to *InvestmentNews* and *WealthManagement*.



Systematic, Data-Driven Investor Acquisition

E5A is already working in your distribution channel.

Professional Investors

We can identify which institutions, consultants, financial advisors or other professional investors are interested in allocating to your strategy. Our deliverable is a spreadsheet of highly qualified allocators for your sales team or wholesalers.

How do we know who is qualified? By measuring their behavior. Digital media allows us to measure by name who is engaging with your content and “scoring” high enough to qualify for an in-person call or visit.

Retail Investors

The industry is embracing segmentation within retail audiences. E5A develops outreach, nurturing and retargeting programs that inform, educate and motivate new assets to walk in the door. E5A has developed its own custom datasets to optimize every marketing dollar. E5A is led by accomplished senior executives with portfolio management, distribution, marketing, technology and advertising experience. E5A energizes asset gathering and can support opening new distribution channels.

Owning the Data

E5A has its own, proprietary investor datasets and is adding more every day. We create custom datasets for clients once we establish your exact or expansive target audience.

E5A is covering institutions, advisors, and many high-value segments of retail investors, and, we are building more datasets every day.

This translates into both laser targeting and scale. This ability is new to asset gathering. E5A has pioneered this data creation aiming to bring the right message, at the right time, in the right context to the right (precision) audience.



Working with E5A

Key facets of planning each campaign are schedules, roles and responsibilities, and specific action steps. As former portfolio managers and analysts, we developed an equity market-beating multifactor model. It is from this type of problem solving and data analytics that we developed E5A's proprietary methodology, custom data, and the math that supports it.

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Understanding Each Channel and its Nuances

E5A is optimizing and creating best practices in digital media, connecting the real world to the web, social media, AI, and wherever allocations are made.

Today, managers can efficiently create awareness, esteem and consideration; gain qualified prospects or direct investments.

We work to support championing your strategies and products, and creating a thorough understanding of your investment thesis and process.

Everything E5A does is focused on gathering new assets at scale.

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

His experience was gained at Beacon Trust, which acquired Corn's firms, Clear Asset Management and Clear Indexes, which created indices tracked by four ETFs and two UITs.

