



# Marketing Services

## What Are Marketing Services?

Pershing provides a broad array of value-added marketing services to help support your efforts to meet the long-term financial needs of your individual investors.

## Features of Marketing Services

- **The Marketing Center.** Accessible through NetExchange Pro<sup>®</sup>, this web-based tool provides you with resources to complement your marketing efforts. From prospecting and publicity tools to seminar hosting kits, you will find everything you need to help grow your business.
- **Marketing Collateral.** Pershing offers an extensive selection of marketing collateral that are available to you at no charge, including brochures, fact sheets, sales kits, and statement inserts. To view or place online orders, access The Source via NetExchange Pro, or you can send an e-mail to [marketing@pershing.com](mailto:marketing@pershing.com).
- **Electronic Files.** All marketing materials are available in portable document format (PDF) for electronic distribution or posting on your firm's proprietary or Intranet sites. In support of your customization efforts, all Pershing marketing materials are available in their native formats for your firm to customize.
- **Speaker Resources.** To help you enhance your conferences, key executives at Pershing, who are well-versed on industry topics and have been noted speakers at numerous industry events, are available to speak at your request.
- **Conferences and Events.** Pershing offers several free conferences and events each year, with inspiring speakers, technology exhibits, and workshops to provide information about our offerings, best practices, and practice management.
- **Informative Updates.** Pershing communicates timely information about current industry initiatives, new products and services, and sales opportunities via a myriad of tools, including letters, Bulletins, Pershing Updates, and quarterly newsletters, such as *The Corresponding View*<sup>®</sup> and *The Pershing Press*<sup>®</sup>.

- **Article Database.** Take advantage of more than 100 product and sales-related articles for inclusion in an upcoming edition of your firm-specific newsletter or as a feature on your firm's web site. New articles are introduced each quarter and can be sent to you via e-mail or you can request a complete set of articles on a CD-ROM.
- **Marketing Consultation.** Experienced marketing professionals are on hand to meet with you, providing you with a knowledgeable resource for information and ideas for your marketing plans, materials, or web site.

## Benefits of Marketing Services

- **Asset-Gathering Support.** From marketing materials to conferences and events to the article database, all of Pershing's marketing services are designed to help you build your business.
- **Knowledgeable Staff.** Benefit from experienced marketing professionals who have extensive knowledge regarding financial services marketing combined with a thorough understanding of Pershing's product and service offerings.
- **Dedicated Support.** Pershing employs marketing professionals who are available to meet with you and serve as a valuable resource for your firm.
- **Complimentary Services.** Leverage our tools, technology, and staff to support your marketing efforts—at no charge.

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