

FALL 2022

# GAMMA NEWS

The Latest Updates From the  
Global Asset Management Marketing Association



## A Letter From Our President

Did you hear the news? The Third Party Marketers Association is now the Global Asset Management Marketing Association (GAMMA). In the past several years, the asset management industry has transformed dramatically. Along with you, we have watched the digitization of our economy, the closure of organizations like PAICR, the shift in work styles and product, and the globalization of the asset management business. We believe GAMMA will continue to bring together an even broader spectrum of active marketing and sales resources from around the globe.

Are you reading this from Asia or Europe? Representing a manager from the UK or Canada? Marketing to family offices in Latin America? Providing consulting services to a team in NYC? Wherever you are and whatever you do in the asset management marketing and/or sales industry, GAMMA is your guide to maximize your business. We could not be more excited for the future, nor more appreciative of your engagement along with us.

Please don't miss the GAMMA Games 2022, which will bring you a few powerful sessions throughout November targeted towards areas of member interest. By attending, you'll be reducing your 2023 membership fees, and taking part in the future of the Association which we will all write, together.

*- Sandra Powers Murphy*

Sandra Powers Murphy, GAMMA President



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Don't Miss the 2022  
GAMMA Games to  
Learn and Save!

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Meet our  
Members

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**GAMMA GAMES PREVIEW**  
*Who in your organization would  
most benefit from an expert  
panel on:*

**November 1st @10am EST**  
**Regulatory & Compliance Update**  
[Click here to register](#)

**November 8th@10am EST**  
**Business Management**  
[Click here to register](#)

**November 15th@10am EST**  
**Sales**  
[Click here to register](#)

**November 22nd@10am EST**  
**Marketing**  
[Click here to register](#)



# A PROVEN DISTRIBUTION OPTION FOR BOUTIQUE MANAGERS

By Arrow Partners



Just like snowflakes and sunsets, no two investment managers are the same. Every firm, from boutique startups to established, have key differentiators that set them apart from their peer group. Today, these differentiators could include hot button topics such as ESG focus or DEI within the firm and strategy. That, in addition to the unique characteristics of the portfolio, risk management and overall profile of the investment team, provides managers with the core nuggets to highlight their distinct edge in a compelling manner.

This is especially important given the highly competitive nature of raising capital in asset management and the transformation that has occurred in the industry over the last decade. It is imperative that boutique managers find a way to develop and articulate their unique “message.” Fifteen years ago, managers could simply call an

institutional gatekeeper or intermediary to discuss their performance, competitive edge and “proprietary research process.” And yes, they would answer their phone because they did not have access to information at their fingertips like they have today. Central repositories, such as eVestment, were not an industry standard. Today, the databases have “real time” core firm and strategy information, resulting in very few investors picking up the phone and since you can be easily screened out by e-mail, you better have something compelling to say to start a conversation. If you are fortunate enough to schedule a video call, which have replaced in-person meetings, your initial discussions focus on in-depth philosophy and process. Follow up calls with investors typically entail recent market and portfolio performance that support your approach and relevant firm and strategy changes. Operational and risk management due diligence has become as important as investment due diligence, thereby lengthening the institutional sales cycle.

What used to take 6–12 months for an allocator to get comfortable can now take 2–3 years. In addition, most of the long-only mandates are “replacement searches,” so new funding opportunities are not likely. In this high stakes environment, it is imperative to have a targeted and focused marketing strategy and team to ensure your firm’s message is consistent and timely. Simply put: Differentiation in both investment strategy and marketing and sales tactics are more important now than ever.

## GAMMA GAMES 2022



**We are excited to once again host the annual games as a forum for member education, networking and engagement. By attending, or having a member of your staff attend, you will receive a \$50 discount in your 2023 annual dues for each session. This can mean a \$200 savings, nearly 1/3 of the annual dues rate. Interested in providing some specific questions you'd like answered in advance on one of our four key topics: Regulatory & Compliance, Business Management, Sales and/or Marketing? Email them to us at [info@growthwithgamma.com](mailto:info@growthwithgamma.com) and we will ensure they are factored into the agenda. Register [here](#).**

Send Us Your Questions:

[info@growthwithgamma.com](mailto:info@growthwithgamma.com)

# GET TO KNOW GAMMA

## MEMBER PROFILES



**HEADQUARTERS: MADRID, SPAIN EU**

Capital Strategies Partners AV SA (CSP) is an Outsourced Marketing Partner specializing in identifying and representing best-in-class asset managers. Founded in 2000 and headquartered in Madrid, the firm is made up of a global team of 29 professionals with significant financial market experience. The business model focuses exclusively on institutional fund distribution across different regions through business partnerships.

CSP serves Institutional clients (Pensions, Fund of Funds, Insurance companies, Family Offices, Privates Banks, Distribution networks) in Iberia, Italy, Switzerland, France, Netherland, LatAm, Brazil, Middle East and Israel. Looking ahead, CSP is most looking forward to expanding their coverage. Want to get in touch with Capital Strategies Partners? Contact Ignacio Perez-Penas [here](#).

***"We encourage our clients to have a TPM service in the regions that are not currently covered and provide a good service to clients, from business development into post investment client service."***



**HEADQUARTERS: JUPITER, FLORIDA USA**

PFM was founded in 1997 by Gilman "Chip" Perkins and has raised over \$7 billion for the managers they have represented. PFM is located in Jupiter, FL after being in Southport, CT for over twenty years. PFM has a senior team of six, with five selling the funds PFM represents. The firm works with between 5 and 7 funds and managers at any time, always with non-competing strategies. These funds usually have in excess of \$100 million under management and a track record in excess of three years. PFM listens to its investor base in determining which managers to take on as the firm wants to bring forward for consideration funds that its investors would be interested in.

PFM is a broker-dealer registered with FINRA (Financial Industry Regulatory Authority) and member, SIPC (Securities Investor Protection Corporation). PFM works with Private Placements including Hedge Funds, Private Equity and other niche strategies including real assets and real estate. To learn more, visit PFM [here](#).

***"We encourage managers to present their edge and to tell their story in the best way possible to potential investors - past, present and future. They must articulate why they present a good investment opportunity to potential investors in order to win mandates."***

# GET TO KNOW GAMMA

## MEMBER PROFILES



HEADQUARTERS: FORT COLLINS, COLORADO USA

TrueCode Capital is a risk-first quantitative hedge fund that helps family offices and high net-worth individuals grow family wealth by creating asymmetric growth opportunities. TrueCode Capital leverages the latest financial engineering, machine learning, and operations research techniques to create funds that deliver asymmetric growth for its clients.

The firm was spun off from the private family office of the founder after years of success in private incubator funds. Serving family offices and high net worth families, the True Code Capital team are experts in managing risk. As a cryptocurrency hedge fund operator, we think of risk management as the tool by which we create asymmetric growth.

Joshua M. Peck is the founding member of TrueCode Capital with nearly twenty years developing and capitalizing on emerging technologies. He utilizes a systems approach to portfolio management that leverages his deep quantitative background through a variety of tools including financial engineering, risk management, operations research, and emerging technologies. Learn more about True Code Capital [here](#).

*"Looking ahead, we are focused on growing and continuing to spin off strategies."*

## ALL ABOUT GAMMA

**About the Association**

The world of global asset management marketing and sales is robust. GAMMA provides a forum for networking, education, best practices, idea sharing, and vendor discounts designed to maximize the business development efforts of professionals worldwide.

GAMMA supports independent, boutique service providers, multi-national corporation marketing and sales professionals, and individual contributors alike. GAMMA is a not-for-profit, peer-to-peer association with members representing a wide variety of marketing, sales, and business development functions. We support members across the asset management business development & support services spectrum and in the areas of:

- Marketing**  
Brand Development, Digital Marketing Support, Public Relations, Team Training and more.  
[Learn More](#)
- Distribution**  
Third Party Marketing, Intermediary Sales, Key Accounts, Institutional Sales & Placement Agents.  
[Read More](#)
- Investment Support**  
Administrators, Custodians, DPs, Verification, Data Management, Due Diligence, FinTech.  
[Learn More](#)
- Regulatory**  
Compliance, Legal, Broker Dealer, Investment Adviser Support, Municipal Adviser Support, Market Education.  
[Read More](#)



*If you haven't visited our new Association website at [www.growwithgamma.com](http://www.growwithgamma.com) you are missing out! Take a minute to check it out today!*

