



# WHAT OUR CLIENTS HAVE TO SAY

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“SunStar is far exceeding our expectations. **Despite a global pandemic, in the four months we have been working with SunStar, our fund assets are up 106%\*!**

We’re in the news continually; Bob Tebeleff and Jake Oxley’s coaching before each interview helps finesse our talking points. And, SunStar is doing a heck of a job faithfully executing our outreach plan to advisors.” \*4/1/2020 to 8/6/2020

**Gerry Sparrow, President & CIO, Sparrow Capital Management | Portfolio Manager, Sparrow Growth Fund**

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"Our first year working with SunStar has exceeded our firm's expectations and some! Spending our precious marketing dollars on PR and getting a great ROI on those dollars spent was the biggest question we had before establishing a relationship with SunStar. Within 6 months or three media tours into our partnership, our ROI had already far exceeded our conservative expectations.

Using PR through SunStar has helped us broadcast our brand and message to the entire country and to reach a demographic that we couldn't have reached without SunStar's expertise."

**Will Kruger, Senior Vice President, YCG Funds, CEO, YCG, LLC**

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"SunStar has exceeded our expectations in creating top notch media opportunities with quality outlets. They are quick to respond and make you feel as though you're their only client. Their expertise and coaching made PR not seem like such a daunting task. Best of all, their hard-working team is an absolute pleasure to work with."

**Brian A. Yacktman, Founder & President, YCG Funds**

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**orinda** ASSET MANAGEMENT

"We hired SunStar to help redesign and rebuild our public website. We are thrilled with the finished product and are proud to showcase our new website to clients and prospects.

The team at SunStar was extremely professional, thorough and creative throughout the process. In addition, their expertise and focus in the mutual fund industry was instrumental in helping to shape the structure and design of the site.

If you're looking for an agency to help take your website to the next level, we highly recommend SunStar."

**Ken Bakar, Director of Marketing, Orinda Funds**

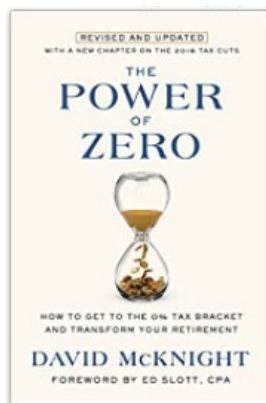
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"SunStar has been extremely helpful in getting our company high-quality media exposure. Even more importantly, they graciously showed us the ropes every step of the way. Hibre is wonderful to work with and has demystified the PR process for us. Much gratitude from our marketing team!"

**Joseph Yaffe, Founder and Chief Executive Officer, Gainesville Coins**

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"When I first met SunStar Strategic, I had a thriving financial planning firm but a brand that had very little recognition on the national stage. Within 6 months, SunStar got me featured in The New York Times, USA Today, Forbes, Reuters, CNBC, Investor's Business Radio, Bloomberg Radio, Bloomberg Businessweek, Yahoo Finance, [Nasdaq.com](https://www.nasdaq.com) and countless others national periodicals.

Now when I speak to clients and prospects, I have instant credibility. Partnering with SunStar Strategic was one of the best investments I've ever made."

**David C. McKnight, President, The Power of Zero Marketing Program**

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"After 21 years in the investment business at a major wirehouse, we felt prepared to know a little about investing and dealing with the public, but we really knew little if anything about marketing a mutual fund. We hired SunStar Strategic to do our PR before the fund even launched to train us to deal with the media. After launch we were assigned a great rep, who was able to secure wonderful interviews with major publications.

Because of one of our interviews, we were introduced to a \$100 million plus client. As we grew, we also found we needed a turnkey approach to managing our website and the media we were generating. SunStar again was able to fulfill that niche.

During one of the toughest three years in the market, with SunStar's assistance, we were pleased to see our assets under management go from \$30 million to over \$200 million today."

**Robert C. Auer, Senior Portfolio Manager, Auer Growth Fund**

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## Plumb Funds

“When we decided to develop a business plan to grow the Plumb Funds, we wanted to find a strategic partner that would understand the limitations we had, develop a plan to overcome them and build on our competitive strengths. SunStar Strategic was the right partner for us. We had some no-nonsense media training, looked at our web site and the image we were projecting, developed interesting points to help media want to talk to us and to build our exposure.

Many things have to work together, but we have almost tripled the size of the Funds in the first eighteen months of working together and are actively building and implementing the next stage of our plan.”

**Tom Plumb, CIO, Plumb Funds**

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## HENNESSY FUNDS

### *Investing, Uncompromised*

“SunStar Strategic has been our public relations partner for well over a decade, and in that time, this fantastic team has consistently exceeded our expectations in offering personalized attention and savvy business strategy.

Melissa Murphy and SunStar have successfully utilized their financial industry expertise and extensive network of reporters to position our team of portfolio managers as

sought-after asset management spokespeople. SunStar has allowed us to garner broad and consistent coverage from virtually every major financial media outlet, which has resulted in the Hennessy name being in the media on average once every two to three days.

The SunStar team is smart and sophisticated, and also fun to work with, and they always get the job done. We couldn't recommend this accomplished team more highly."

**Neil Hennessy, President, Portfolio Manager, Hennessy Funds**

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"SunStar Strategic has been a valuable member of our team since 2003 and continues to be instrumental in the development of our business. Because of the industry experience and focus of SunStar's people in the asset management industry, they 'get' the subtleties and nuances of marketing to this very fickle and fast-paced industry in a way that others do not."

**Michael Cuggino, President, Portfolio Manager, Permanent Portfolio Family of Funds**

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"I believe we had a winning investment strategy but knew little about telling the story. You showed us how to tell the story and who to tell it to. If a tree falls in the forest and nobody hears it, did it really fall?"

**George Young, Partner, Villere & Co.**

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"It's been a real pleasure working with you and the other members of the team, and I'd welcome the opportunity to tell the story of how you've helped us turn an idea we had last summer into over \$30,000,000 (already) in our mutual funds. Thinking back, it's a great story, starting with SunStar Strategic's consulting help. And we believe the future is even brighter."

**Diarmuid Boran, Managing Director, Business Development, Meritage Portfolio Management**

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*Collective Strength. Individual Insight.*

"Media coverage has been and continues to be an important way to increase our company's exposure, and the folks at SunStar Strategic have been valuable partners in making that happen."

Working with the media requires both time and energy, and my SunStar contact has not only been outstanding in setting up interviews, but also helping me be as effective as possible in the interviews, so I don't waste my time. But perhaps what I value most about SunStar is the patient and positive coaching after the interview on techniques to make it better the next time."

**Alan Gayle, Senior Investment Strategist, RidgeWorth Investments**

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"Prior to Huntington Funds' relationship with SunStar Strategic, we had very little exposure to the media and found little success in advertising. Since retaining SunStar, Huntington Funds' managers are frequently on national media circuits, adding a great deal of credibility and more brand recognition.

SunStar Strategic has been instrumental in the education of our key staff in how to conduct interviews so we provide the most professional appearance. This has proven valuable as many in the media now contact us directly because they are assured that our staff will present a succinct and appropriate message."

**Randy Bateman, President and Chief Investment Officer, Huntington Funds**

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"The team at SunStar Strategic helped us to shape our message so that every conversation we have with clients, prospects and the media has more impact."

**Keith C. Goddard, CFA, President, Capital Advisors**

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“The team at SunStar Strategic is World Class talent that understands how to celebratize leaders and subject matter experts through the most respected and well-known media outlets, while also understanding how to help those individuals best prepare for media exposure and deliver like champions.”

**Rick Corrado, Co-Founder & CEO, The Four Cups**

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“We worked with SunStar to create new materials for an important client meeting. This is by far the best presentation we’ve ever had.”

**Candice Lightfoot, Chief Operating Officer, Wildermuth Advisory, LLC**

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**Call Kathryn Morrison, CEO & President, today to see how SunStar Strategic can help your firm build credibility and grow!**

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