

# Strategic Public Relations & Communications for the Financial Services Industry



New York

| Los Angeles

| Washington, DC

[www.daipartnerspr.com](http://www.daipartnerspr.com)





# What Our Clients Say

"They have deep industry information, they have deep connections with the right media, and they do effective counseling on our messaging...they really understand the business so they can create the right message to right audience."

"We are working with the actual partners, people who can think outside the box. Dealing with partners brings a higher level of success."

"They get us. They create by-lined article placements and organize media tours within our budget. They plan events and execute them with measurable results—it is a good dollar value."

"They understand our company. I see them as an extension of our team. I sometimes talk out situations with them that I don't talk to anybody else about. I know I can trust them."

# In-depth Knowledge of Financial Services and the Media Who Cover It

## About DAI Partners

All of our partners have spent their careers in financial services. This singular focus gives our clients the benefit of experience, perspective and an unparalleled understanding of the industry and the media who cover it.

DAI clients get advice based on knowledge accumulated during more than three decades of business cycles, economic bubbles, financial shocks and political turmoil. Our work is in tune with both the challenges and opportunities financial firms face and the realities of today's media landscape. We deliver results-driven public relations programs backed by the highest levels of industry understanding and connections.

DAI clients tell us they appreciate our accessibility and dedication. In a world full of distractions, we remain focused on achieving their goals. We understand clients are busy building their businesses. When extra resources are needed, we step up to the plate. They can count on DAI to deliver results.

We form close partnerships with clients and, in a business known for its turnover, our clients stay with us for the long term. We often continue to advise and work with them as they move ahead in their careers through multiple jobs, sometimes for decades.



# The DAI Difference

At many public relations agencies, senior executives pitch the business and then take a back seat or disappear. DAI's business model is very different. DAI clients deal exclusively with our partners. This eliminates the catch-up time clients waste educating new agencies about financial services.

All of DAI's partners have spent their careers in financial services, working with different kinds of firms and strategies. There's no need for clients to start educating us about the industry – just about how they fit into the financial services ecosystem. Also, we know what's interesting to the media, what's unique, and how to approach journalists to gain traction.



Founder Angela Dailey (front row, fifth from left) networking at the Milken Global Conference



# Putting Our Media Relationships to Work for Clients

## We Know What's News

The media landscape is changing dramatically but relationships remain central to successful public relations campaigns. We are financial news junkies, following what is trending and leveraging that knowledge for the benefit of our clients.

DAI staff attend industry events and meet one-on-one with journalists to exchange ideas and hear directly from them about their interests. We build and maintain long-term relationships. We know what interests specific reporters and publications and we take a targeted approach to our outreach. We attract strong attendance at the press events we organize for our clients.

# Effective Programming, Out-Of-The-Box Thinking

## Our Clients Manage over \$2.5 Trillion in Assets

Asset and Wealth Managers  
Banks  
Community Development Financial Institutions  
Defined Contribution Firms  
FinTech Firms  
Financial Trade Associations  
Hedge Funds  
Money Managers  
Mutual Funds  
Private Equity Firms  
Retirement Specialists

## Channels We Cover

Family Offices  
Financial Advisors  
High Net Worth  
Individual Investors  
Institutional Investors  
Private Equity – General and Limited Partners  
Retirement Specialists



# Strategic Thinking, Strategic Partnerships

Currencies	\$1=	Change
British POUND	0.6529	+0.0001
Czech KORUNA	20.1790	-0.0440
Danish KRONE	5.8659	+0.0005
European EURO	0.7889	+0.0002
Hungarian FORINT	244.9750	-0.4150
Norwegian KRONE	6.0616	+0.0023
Polish ZLOTY	3.4800	-0.0056
Russian RUBLE	31.8485	-0.0307
Swedish KRONA	6.9936	+0.0019

## Unlocking Your PR Potential

DAI's client relationships typically start with strategic planning. We get to know your business and your goals so that we can recommend public relations programs and communications initiatives to help you achieve your business and marketing goals. Implementation begins as soon as you are ready.

If you lack the staff to accomplish your goals, we will step up to the plate for you. If you are a large firm but can't find the time to promote a department, executive or product, we can help. We'll also be there for you in a crisis. Depending on your needs, our affiliates can provide editorial, advertising, media training, research, and branding support. We will work with you to accomplish what you need.

We also summarize your results and use analytic tools to determine your share of voice and measure the success of your program.

## Services

Analytics

Broadcast and Print Interviews

Content Marketing/Thought Leadership

Crisis Management

Editorial Services

Press Events

Social Media

Strategic Planning



DAI client on set with Maria Bartiromo of Fox Business News

**Our clients are interviewed and quoted in the national financial news media. Here's a sampling.**

Barron's

Bloomberg News, Radio and TV

CNBC

Financial Advisor

Financial News

Financial Planning

Financial Times

Investment News

New York Times

Pensions & Investments

Reuters

Wall Street Journal





# Promoting Your Brand and Thought Leadership

In the digital world, content is king. We take an integrated approach across all communication channels to find, engage and retain your most important stakeholders. We promote your brand through traditional media outreach and digital content marketing – articles, posts, podcasts and video – all search engine optimized and supported by social media.

We take existing content – white papers, client communications, or newsletters, for example – and repurpose it in print and digital media. If there is no content, we can create it by interviewing your subject area experts. This creates a beneficial “stickiness” between you, your clients and your prospects.

## Where our clients' posts and articles appear

Advisor Perspectives

Employee Benefit Advisor

Employee Benefit News

Family Wealth Report

Financial Advisor IQ

Financial Planning

FundFire/Ignites

Huffington Post

Investment News

MarketWatch

Private Asset Management

Seeking Alpha



# Stability of staff — worked together for decades

## Your Partners

**Angela Z. Dailey, Founding Partner**



Angela founded DAI Partners in 1989. Previously, she was Senior Vice President and a member of the Board of Directors of Drexel Burnham Lambert. She headed the investment bank's communications efforts for more than 16 years. Angela has worked with dozens of financial services firms, making DAI Partners one of the premier public relations firms serving the investment management industry.

[dailey@daipartnerspr.com](mailto:dailey@daipartnerspr.com)

**Elizabeth Tower Powell, Partner**



Before joining DAI in 2004, Elizabeth led public relations at the Investment Company Institute, the mutual fund industry's national association, from 1995 until 2003. During that crucial growth period for the industry, she was responsible for developing and executing strategies and tactics to promote its image and policy positions. She has more than 25 years of experience in financial communications.

[powell@daipartnerspr.com](mailto:powell@daipartnerspr.com)



# Your Partners

**Patrice M. Kozlowski, Partner**



Patrice joined DAI after heading Corporate Communications for The Dreyfus Corporation, a BNY Mellon company, for 19 years. As Senior Vice President and Chief Company Spokesperson, she was a member of Dreyfus' Executive Committee, responsible for executive, internal and external communications, media relations and crisis communications. [kozlowski@daipartnerspr.com](mailto:kozlowski@daipartnerspr.com)

**Kate Ennis, Senior Account Executive**



Kate comes to DAI after holding senior positions in public relations at the Financial Services Roundtable and Standard & Poor's. She was part of the award-winning agency team that marketed the U.S. Treasury's electronic savings bonds program. Previously she was an editor at CNBC. She joined DAI in 2010. [ennis@daipartnerspr.com](mailto:ennis@daipartnerspr.com)



# Your Partners

## Melinda Staab, Senior Account Executive



For more than a decade, Melinda Staab has worked for clients and agencies, developing and implementing successful marketing and public relations campaigns for multi-billion dollar financial services organizations. Prior to joining DAI in 2010, Melinda was Public Relations Manager, Rydex Mutual Funds. [melinda@daipartnerspr.com](mailto:melinda@daipartnerspr.com)

## Arlene Hershman, Press Strategist

Arlene has worked as a media strategist, writer and media trainer since 1989. For six years, she also produced an annual one-day seminar for public relations professionals about dealing with business journalists. Arlene was editor of Dun's Review (later known as Dun's Business Month). She was the first woman ever named the top editor of a major business magazine.