

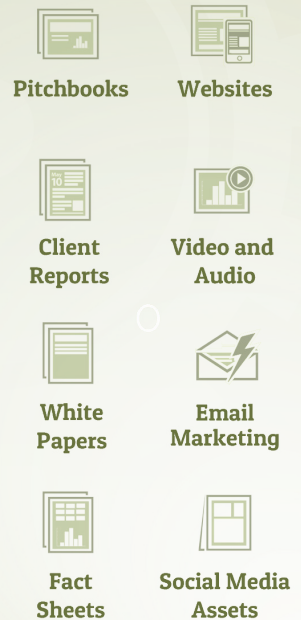
Design & Production for Large Investment Firms

Designing and producing custom investment communications since 2006

Large asset managers occupy a distinct position in the industry. With expansive product lineups, global distribution teams, and complex governance structures, they must produce marketing and client materials that not only reinforce credibility, but also scale across thousands of touchpoints. Unlike smaller firms that are often challenged with establishing institutional discipline, large firms wrestle with the opposite: sprawling systems, fragmented processes, and inconsistent execution across regions and channels.

Bull Marketing partners with large investment managers to modernize, unify, and scale their marketing material ecosystems. By standardizing design systems, streamlining workflows, and implementing automation, we help global firms achieve consistency without sacrificing agility. The result: materials that meet consultant and institutional allocator expectations, reduce compliance risk, and serve the needs of multiple business lines at once.

” For large firms, disciplined design is not about looking institutional, it’s about ensuring coherence at scale.



Creative Services: *Elevating a Global Brand*

A global brand is a design system with countless elements. Large firms often suffer from “brand drift” as dozens of teams create materials in silos. The antidote is a shared language of design that spans all offices, platforms, and business units.

- **Clarity through hierarchy is essential:** headlines, charts, and disclosures must withstand scrutiny from consultants, regulators, and allocators.
- **Uniformity at scale is critical:** every pitchbook, factsheet, or digital asset should reinforce the same identity, regardless of who produced it.
- **Global adaptation demands flexibility:** the brand’s integrity must hold while accommodating local market nuances.



KEY INITIATIVES

1 Enterprise Design System Integration

Extend grids, typography, and chart conventions into enterprise platforms (PowerPoint, Seismic, Salesforce, content management systems, etc.) so every team works from the same standards.

GREATER

- ↑ global brand consistency
- ↑ compliance pass rate

LESS

- ↓ off-brand edits
- ↓ duplicative design work

2 Consultant- & Allocator-Grade Decks

Modernize pitchbook frameworks to handle multiple strategies and geographies while keeping the story clear and unified.

GREATER	LESS
↑ allocator comprehension	↓ business development rework
↑ second-meeting rates	↓ unnecessary review cycles

3 Master Template Ecosystem

Roll out interconnected templates for pitchbooks, factsheets, and Requests for Proposals (RFPs) that enable fast updates across hundreds of products.

GREATER	LESS
↑ quarter-end throughput	↓ manual formatting errors
↑ automation leverage	

4 Global Data Visualization Standards

Create a unified rulebook for scales, legends, and annotations that applies across the firm.

GREATER	LESS
↑ trust in data	↓ misinterpretation risk
↑ faster analyst workflow	↓ inconsistent visuals

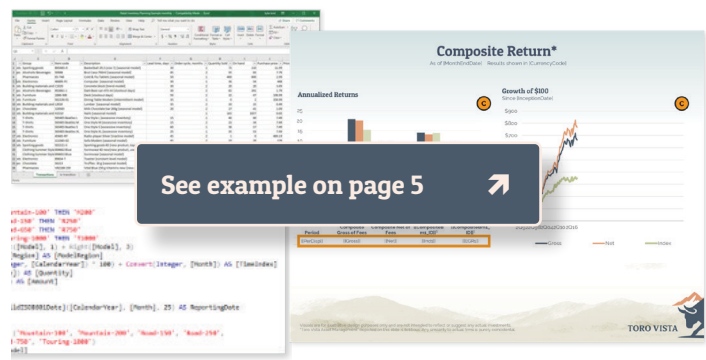
5 Accessibility & Format Readiness

Ensure assets perform in presentation, print, and digital platforms firmwide.

GREATER	LESS
↑ usability across all formats	↓ last-minute fixes
↑ accessibility compliance	↓ readability problems

Content Automation:
Managing Scale with Confidence

At large firms, scale magnifies risk. When dozens of teams update hundreds of products each quarter, the potential for errors, inconsistencies, and bottlenecks multiplies. Automation operationalizes brand discipline, centralizes compliance, and still empowers regional teams to execute with agility.



KEY INITIATIVES

1 Enterprise Component Library in Seismic

Governed modules and pre-approved disclosures ensure all materials adhere to brand and compliance standards.

GREATER	LESS
↑ adoption of approved content	↓ version confusion
↑ speed of assembly	↓ unauthorized edits



2 Data-Bound Charting & Reporting

Connect exhibits directly to data warehouses, reducing manual intervention and eliminating mismatches across strategies.

GREATER

- ↑ accuracy in reporting
- ↑ efficiency in quarterly updates

LESS

- ↓ copy-paste errors
- ↓ inconsistent metrics

3 Audience-Specific Global Kits

Modular kits tailored for consultants, allocators, and distribution partners worldwide to ensure consistent messaging across regions.

GREATER

- ↑ targeted relevance
- ↑ faster follow-ups

LESS

- ↓ generic decks
- ↓ redundant customization

4 Disclosure Centralization at Scale

A companywide "single source of truth" with expirations and alerts ensures regulatory alignment across jurisdictions.

GREATER

- ↑ legal confidence
- ↑ audit readiness

LESS

- ↓ outdated footnotes
- ↓ jurisdictional gaps

5 Localization Playbook

Guardrails for regional teams support local adaptation without undermining the global brand.

GREATER

- ↑ cultural resonance
- ↑ smoother regional adoption

LESS

- ↓ off-message variations
- ↓ design fragmentation

” Enterprise automation reduces risk, accelerates updates, and gives local teams speed without compromising brand control.

Content Maintenance: Sustaining Enterprise Discipline

For large firms, the challenge is not just producing materials, it's maintaining them across hundreds of strategies and business units. Without disciplined governance, assets quickly become outdated, duplicative, or misaligned.

- **Quarter-end surge support** ensures large-scale releases meet deadlines without sacrificing quality.
- **Lifecycle management** retires stale content and keeps master templates current.
- **Governance frameworks**—version control, usage dashboards, and adoption monitoring—provide leaders with visibility and accountability.



” At enterprise scale, governance is what turns hundreds of moving parts into a reliable system.



Every Firm's Blueprint:

Defining the "Blue Sky"

Even at scale, no two large managers are alike. Each carries a unique legacy, philosophy, and culture. We design systems that reflect this DNA while embedding the governance required by global stakeholders.

Through co-design sessions and lightweight prototypes, we balance creativity with compliance, giving firms the freedom to differentiate while ensuring every output is consultant- and allocator-ready.

By "blue sky," we mean the set of ambitions and guardrails that define what's possible for your brand: where you want to go, what must never change, and how bold you're comfortable being. Early working sessions map those constraints and freedoms into design parameters (i.e. type scales, color roles, grid density, charting conventions, voice and tone) so creativity lives inside boundaries that fit your organization, compliance requirements, and audience expectations. The result is design that is distinctive without drifting from institutional norms.

Our process is collaborative but structured. We facilitate co-design workshops, guided prototypes, and stakeholder reviews to align global teams before rollout. Delivery includes scalable templates, standardized frameworks, and an institutional-grade brand guide, ensuring the system remains coherent as it scales enterprise-wide across teams and divisions.

“ Every firm carries its own goals, constraints, and workflows. Our role is to adapt proven best practices to your unique challenges.

Examples of "blue sky" guardrails we capture:

- Brand voice and tone (formal vs. conversational, assertive vs. understated)
- Color standards (firmwide palettes, contrast ratios for accessibility, screen vs. print adaptation)
- Imagery and iconography (people, processes, data visualization style)
- Charting and reporting conventions (axis rules, labeling, annotation practices)
- Balance of quantitative detail vs. narrative framing (how much data vs. storytelling emphasis)
- Compliance and disclosure protocols (placement, versioning, expiration alerts)

Partnering with Bull Marketing:

Enterprise-Ready Design

Your firm's materials should project institutional credibility and global coherence before a word is read. Bull Marketing brings two decades of experience helping investment firms of all sizes, including global managers, elevate how they present themselves to the market.

We begin with a diagnostic, then deliver a phased plan that balances quick wins with long-term systems. The result: marketing ecosystems that are consistent, scalable, and compliant, without sacrificing agility or creativity.

“ At scale, consistency *is* credibility.

WHAT TO WORK TOWARD – AND HOW:



Message Framework

Unify positioning across global teams and strategies.



Visual Identity

Extend standards into scalable, reusable systems.



Report Modernization

Enable efficient, accurate updates across vast product lineups.



Digital Alignment

Integrate standards across portals, websites, and global campaigns.



Data Standards

Codify charting, tables, and annotation rules across all geographies.



Collaboration Workflows

Connect marketing, portfolio managers (PMs), compliance, and sales teams.



Governance Discipline

File-naming, versioning, and audit trails at scale.



Continuous Optimization

Monitor usage and refine systems continuously.

Example Content Maintenance

Refresh your marketing materials with up-to-date data and timely content changes each update cycle

Visually formatted for each material

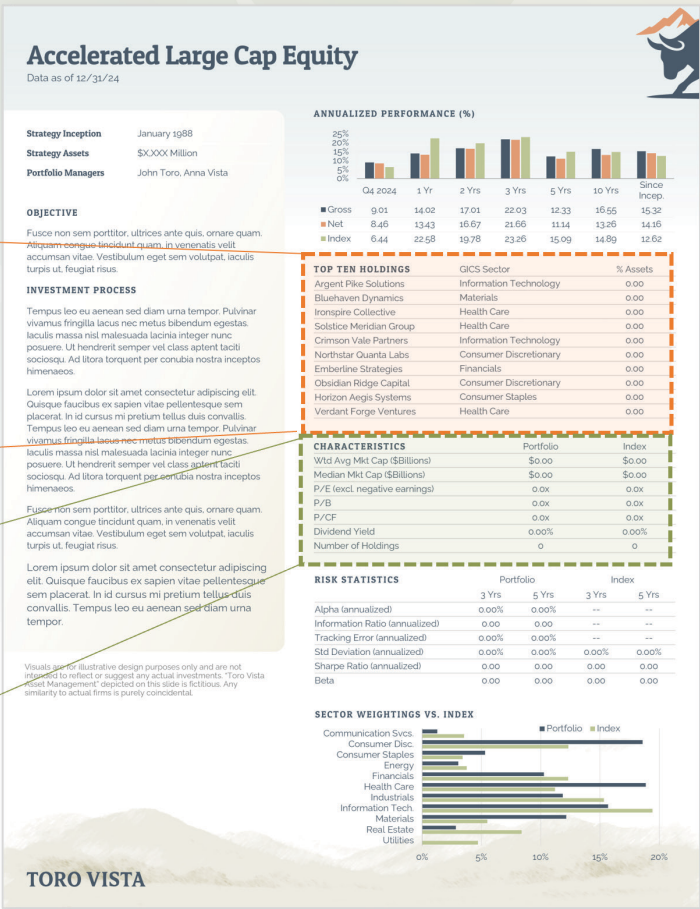
Source files with updated data

	A	B	C	D
1	Holding	Sector	% of Holding	
2	1 Argent Pike Solutions	Information Technology	5.2	
3	2 Bluehaven Dynamics	Materials	4.1	
4	3 Ironspire Collective	Health Care	4.1	
5	4 Solstice Meridian Group	Health Care	4	
6	5 Crimson Vale Partners	Information Technology	3.9	
7	6 Northstar Quanta Labs	Consumer Discretionary	3.5	
8	7 Emberline Strategies	Financials	3.3	
9	8 Obsidian Ridge Capital	Consumer Discretionary	3.1	
10	9 Horizon Aegis Systems	Consumer Staples	2.2	
11	10 Verdant Forge Ventures	Health Care	1	

	A	B	C
1	Portfo	Ind	
2	Wtd Avg Mkt Cap (\$Billions)	\$0.00	\$0.00
3	Median Mkt Cap (\$Billions)	\$0.00	\$0.00
4	P/E (excl. negative earnings)	0.0x	0.0x
5	P/B	0.0x	0.0x
6	P/CF	0.0x	0.0x
7	Dividend Yield	0.00%	0.00%
8	Number of Holdings	0	0

Visuals are for illustrative design purposes only and are not intended to reflect or suggest any actual investments. "Toro Vista Asset Management" depicted on this page is fictitious. Any similarity to actual firms is purely coincidental.

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Let's connect.

We'd love to learn about your goals and explore how Bull Marketing can support your team.

Request more info or
book a consult ➔

info@bullmarketing.net

bullmarketing.net

Weekdays 9-5am EST

Located in Pennsylvania | Supporting
teams nationwide