

Kegie Consulting Corp.

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Cooperative Marketing

Coop Marketing! What's that? Does anybody do that anymore? At Kegie Consulting Corp. we know that the mutual fund companies have money allocated for Coop Marketing, and we believe you should have that money!

- We have the forms required to make any initiative successful. These forms can be branded with your logo.
- We know what backup documentation is required for each type of initiative, i.e. advertising, education or client education seminar. Further, we know just what questions to ask so that we can get that information from your Approved Persons OR, depending on the initiative, we can provide the backup documentation on behalf of your Approved Person.
- We have contacts at many mutual fund companies and will ensure that your request gets to the right person in a timely fashion.
- We will follow up as appropriate with the fund companies to ensure that the initiative is successful.
- Our files are very detailed, kept in immaculate order and will be made available to the regulators at the time of your Compliance Audit.
- We are prepared to provide training to your Approved Persons, so that they can complete the forms, provide the back up documentation and facilitate their own successful initiatives from start to finish, providing you with all the required information so that you can make the request on their behalf, all without impacting the resources of your Compliance Department.