**Drawbridge Capital 4-Page Brochure Design Project** 11 April 2019 (updated)

**DESIGN NOTES**

1. This brochure will be used as a standalone piece introducing our firm as an organization. The combination of the copy and design elements should capture audience attention, be easily read, clean and uncluttered, with generous use of empty or “white space.”
2. We envision a 4-page, 8-1/2” x 11” design to be printed at **600dpi** resolution on 11”x17” gloss paper, folded in half. If you think a different size format would work better, please tell us. We would prefer your files in **.pub (Microsoft Publisher)** format but **.pdf** is also acceptable.
3. The target audience will be financial professionals, institutions (foundations, endowments), high net worth individuals, and investment consultants. The look and feel should be very professional, *not* retail, *not* too cute or “artsy.” We will be asking the target audience to hire our firm to invest $2 million or more.
4. As a firm we take a distinctive, unconventional approach, and we really do not want our brochure to look like “every other bank or investment company” with images of families, retired people, college graduates, etc. We do however want to convey messages of: Trust, Professionalism, Skill, Experience, Independence, Disciplined, Successful, Confident.
5. **Use of graphic elements and/or pictures -** We welcome your thoughts on the use OR not of pictures and graphic elements throughout. We believe, if used, they should not detract/distract from the message we wish to convey. The words tell the story, the pictures or graphic images should quietly support and complement it. Any pictures of people should not show faces distinctly.
6. About our company name: We have incorporated *modern* bridge and Wall Street related elements into our marketing (**not** old, industrial or medieval bridges or drawbridges), and we would consider complementary OR different concepts for this brochure. The presentation should tilt toward more modern, clean, professional design.
7. Our color scheme is dark blue and light blue, accented with dark and light gray.
8. The Drawbridge logo (vertical, left below) should be prominent on the first page of the brochure and should also appear (either vertical or horizontal version) on the back page. It OR just the graphic element might also be incorporated subtly on interior pages. A **compressed archive of logo images** in various formats is available for download.





1. The brochure contains *nine* distinct sections of copy (*provided below*) used to describe our firm, our beliefs, and why a client should consider us. **We envision a layout that is something very different from traditional stacked paragraphs of copy in columns.**  We want the copy sections (**not** the contact information and cited footnotes) to draw attention, compel consideration, be easily read, be comfortable to view, and flow across/through the four pages of the brochure. We see the first eight copy sections as distinct “sound bites” or 20-second commercials; we’d like to weave them together to tell the story, but each can also stand alone.
   * The first page of the brochure should include the “Open for Business” and *possibly* the “Proven Leadership” sections.
   * The “Why Drawbridge” summary section will preferably be the last section on page 3, but it *could be* at the top of page 4 if this helps to balance the layout.
   * The last sections (mission statement, contact information, and required footnotes) just need to be somewhere on the back page. Footnotes are typically at the bottom of the page in smaller print (font size 9?). Mission Statement and Contact could be side by side above it.
2. On each of the first three pages we would like to incorporate a quotation. These might appear in a text box or at the bottom of the page. Not exactly part of our narrative, but they are relevant quotes that illustrate things we believe. The quotes are:

*“If you want to have a better performance than the crowd, you must do things differently from the crowd.” - Sir John Templeton*

*“No one can possibly achieve any real and lasting success by being a conformist.” - J. Paul Getty*

*“Any intelligent fool can make things bigger and more complex. It takes a touch of genius – and a lot of courage – to move in the opposite direction.” - Albert Einstein*

1. The “Small Cap Growth” section has a text box (shown below) that briefly restates and highlights the key points in an important section. If you think a text box would be useful elsewhere, we would be glad to provide text copy, upon your request.

*We know small cap*

*Active management is rewarded*

*We have a competitive edge*

*We can meet a need*

1. **The rest of this document is the brochure text.**

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| **Drawbridge Brochure Copy [with notes for designers]** |
| **Open For Business**  Drawbridge Asset Management is open for business.  With a solid three-year track record, we are introducing our small cap growth strategy to institutional investors.  We are a relatively new firm with seasoned leadership. Our active equity investment process has generated consistent alpha since 1999.  With many investors seeking smaller, undiscovered boutique managers to boost portfolio risk-adjusted performance, Drawbridge is worth consideration for our ability to complement other strategies and deliver competitive returns. |
| **Proven Leadership**  Leading the equity team at Drawbridge is Chief Investment Officer Glenn Fogle, a 30-year industry veteran. He directed teams at American Century Investments for 17 years, ultimately overseeing more than $7 billion as ACI’s Chief Investment Officer – Mid and Small Cap Growth Equity.  Glenn envisioned applying his core investment philosophy free from the constraints of a big risk-averse organization. At Drawbridge, Glenn has incubated this strategy to lay the foundation for a best-in-class equity management firm.  [*Note:* this quotation to appear at the bottom (?) of first page:]  *“If you want to have a better performance than the crowd, you must do things differently from the crowd.” - Sir John Templeton* |

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| **Different by Design**  Top investment performance seldom comes from following the crowd. It usually requires doing something unconventional. Drawbridge represents a compelling departure from our peers.  Our distinctive philosophy, disciplined process, and solid historical performance place us among a select group of managers.  We take pride in standing apart from our competition. |
| **Singular Perspective**  Which path would you choose to guide your decisions: knowledge or speculation? In investing, we value *facts* over forecasts and find *probability* more useful than prediction.  At Drawbridge, we look for companies whose growth is accelerating. Our original research is unbiased by outside opinion. We focus on understanding the key drivers of growth and major risks, filtering out extraneous information.  Our definition of growth and proprietary insight are key components of our competitive advantage. |
| **Concentrated Portfolios**  Equity managers typically own too many names, diluting their best ideas in overdiversified portfolios.  Drawbridge portfolios are concentrated, exhibiting high conviction and high active share. Every position has the potential to contribute significantly. Research shows that more concentrated portfolios produce superior risk-adjusted returns.  [*Note:* quotation to appear somewhere on second page:]  *“No one can possibly achieve any real and lasting success by being a conformist.” - J. Paul Getty* |

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| **Small Cap Growth**  With one chance to make a good first impression, small cap growth was the obvious choice for Drawbridge’s debut strategy.   * Our CIO has successfully managed small and mid cap portfolios for over 20 years   *We know small cap*  *Active management is rewarded*  *We have a competitive edge*  *We can meet a need*   * Small cap offers the potential for significant alpha * Modest asset base and relatively low turnover insulate us from liquidity constraints * Many small cap managers are closed to new investors and we have capacity   The solid performance of this strategy since 2016 is consistent with the track record of similar portfolios managed by Glenn Fogle since 1999. |
| **Uncorrelated Alpha**  At Drawbridge, we do not settle for performance that is slightly ahead of the benchmark. We aim to deliver exceptional risk-adjusted returns.  Clients with multi-asset class portfolios look beyond a manager’s performance to consider the correlation between strategies and their diversifying impact on the overall portfolio.  Managers, who typically are focused within their style box, rarely address this essential topic.  Drawbridge appreciates the importance of low manager correlation to a client’s overall portfolio. Our process is designed to generate superior alpha at significantly lower correlation to a client’s other strategies. |
| **Defense Wins Championships**  The formula for investment success is pretty straightforward: Own more winners than losers. Since some losses are inevitable, our discipline is designed to minimize their impact.  When the market environment turns unfriendly and risks outweigh opportunities, we focus aggressively on capital preservation. Long term investors should have an alternative to remaining fully invested through bear markets and absorbing significant paper losses. We work to limit the downside through strategic risk management – playing strong defense.  A dollar not lost is a dollar gained, and over a market cycle minimizing losses can add real value.  [*Note*: quotation to appear somewhere on third page:]  *“Any intelligent fool can make things bigger and more complex. It takes a touch of genius – and a lot of courage – to move in the opposite direction.” - Albert Einstein* |

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| **Why Drawbridge?**   * Twenty-year history of successful growth investing * Distinctive alpha drivers, fundamental and behavioral * Proven, disciplined investment process * Bold performance objectives * Concentrated portfolios with few alpha-limiting constraints * Consistently strong risk-adjusted returns * Low correlation to other strategies * Modest asset base with capacity to grow |
| **Our Mission**  To deliver high alpha investment returns with lower volatility  and lower correlation to the broad equity market  over three- and five-year periods |
| **Contact Client Relations:**  Russ Cembrinski  Metro New York  917-825-1793  Russ@drawbridgeam.com  www.drawbridge.capital  Drawbridge Asset Management  7134 South Yale, Suite 700  Tulsa, OK 74136 |
| *Drawbridge Asset Management is a subsidiary of Drawbridge Capital, LLC, an SEC registered investment adviser based in the state of Oklahoma. SEC registration of an investment adviser does not imply any level of skill or training. Additional information about Drawbridge Capital, LLC also is available on the SEC’s website at www.adviserinfo.sec.gov.* |