

# Using Social Media in Fund Communications

Thurgood Marshall Ballroom  
Up One Level



# Using Social Media in Fund Communications



# Using Social Media in Fund Communications

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Legg Mason

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Vanguard

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# Agenda

- Growing Social Media Universe
- Social Media Use by Asset Management Firms
- Panel Discussion and Audience Questions



# Growing Social Media Universe



**Scribd.**



**flickr™**



*foursquare*

“...Media for social interaction, using highly accessible and scalable communication techniques.”



**facebook.**



**Google**

**Linked in**

**WIKIPEDIA**  
*The Free Encyclopedia*

# Social Media Use

- Asset management “finding social media voice” – use grows from 13% in 2008 to 45% in 2010
- More than 66% of asset managers say their firms have a social media strategy in place
- But, 89% of ICI Communications Committee members believe firms lag others in social media use
- ICI programs:
  - Friday Compliance session, 9:00 a.m.
  - Fall 2011 Social Media webinar

*Sources: Wall Street Journal, Feb 2011; Kasina 2011; Tiller Survey of ICI members, 2010*

# Panel Discussion and Audience Questions



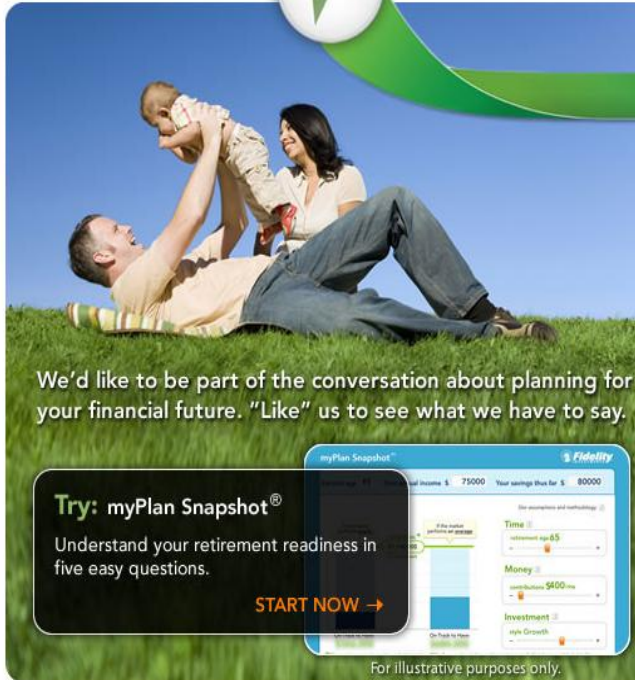


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April is Financial Literacy Month. What are your financial rules to live by?  
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**Mappz Rivera De Leon** Does Big retirement payout guarantee security or happiness? I don't want to be rich when I get old yet suffer myself & family with deprivation in all my productive years. Balance planning is the key.  
3 hours ago

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**What to do with "phishy" e-mail**  
By Ellen Ritadi on April 6, 2011 9:03 am

Many of us—myself included—recently received alerts from banks and major retailers notifying us that our names and e-mail addresses had been “hacked” as a result of an attack on a third-party service used by these businesses to handle e-mail distribution. (Vanguard was not one of the companies affected.)

I wasn't happy when I was informed, of course, but at least I'm not helpless. And neither are you.

**A mood ring for the markets?**  
By Catherine Gordon on April 1, 2011 11:46 am

For as long as humans have been around, we've looked to patterns to help us understand the present and divine the future. Reading tea leaves and animal entrails are just two on a long list. Not surprisingly, using patterns to try to understand the stock market has received considerable attention through the years. As technology has evolved, so have the “tools.”

Two in particular caught my interest: a hedge fund that uses Twitter to predict market moves, and something called the “Ambient Orb.”

**On the origin of bubbles**  
By Steve Utkus on March 23, 2011 8:50 am

I was traveling a few weeks ago to visit with institutional clients. For my travel reading, I downloaded Michael Lewis's *The Big Short*. It's a colorful look at some of the personalities during the great financial crisis of 2008–2009—in particular, the handful of market participants who saw the crisis coming.

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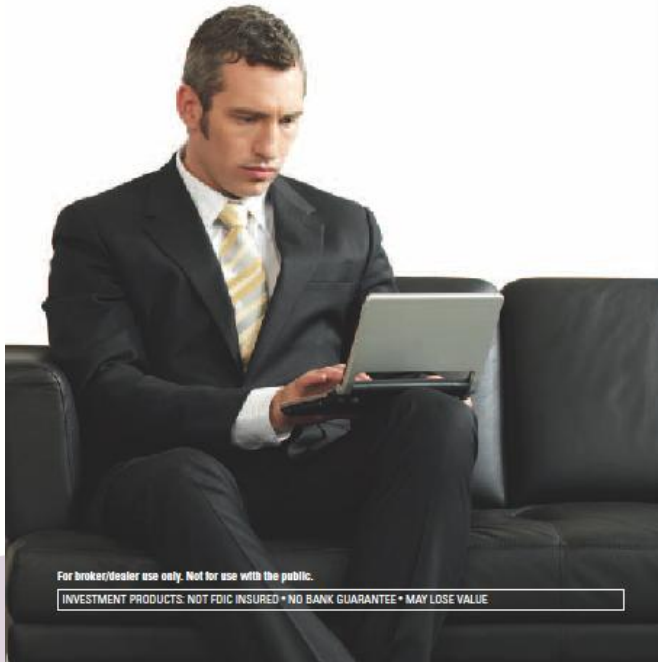


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# Client acquisition in a wired world

The advisor's guide to social networking



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