



Carcie Consulting is a Marketing and Investor Relations consultancy, assisting alternative investment managers, across both private funds and publicly listed companies, with their sales and marketing processes, by creating or developing their marketing and client infrastructure.

Carcie Consulting aims to add value to a firm by implementing institutional quality marketing infrastructure, allowing a Head of Sales / Investor Relations to concentrate on raising assets, rather than client operations, thereby accelerating revenue generation.

The primary focus covers:

<p>MARKETING MATERIALS</p> <p>Create or design your brand guidelines.</p> <p>Design or revise marketing materials such as social media templates, fund teasers, investor presentations, annual results presentations.</p> <p>Complete RFPs or create / update due diligence questionnaires and all supporting due diligence documentation (sample investment committee memos, compliance policies and constitutional documentation) for prospective investors.</p>	<p>REPORTING</p> <p>Design a suite of investor reporting (including a monthly newsletter, quarterly report or full annual company report) working in conjunction with a fund administrator where needed.</p> <p>Set up email distribution lists, manage investor update calls as well as organising company annual results presentations or investor due diligence days (venue, invite list, presentation materials).</p>
<p>DIGITAL MARKETING</p> <p>Develop and manage a website including design, content and usability.</p> <p>Create and manage a corporate LinkedIn and or Twitter presence.</p>	<p>CRM SYSTEM</p> <p>Select and implement a CRM system (or adapt an existing one) to suit the business needs.</p> <p>Develop a full suite of management reporting.</p>
<p>DATAROOM</p> <p>Implement an investor portal or dataroom for prospective investors and, where applicable, customise the fund administrator's portal.</p>	<p>PR AND MEDIA COVERAGE</p> <p>Introduce and or work with an existing PR agency, to assist with branding, content and media coverage.</p>

Carcie Consulting can also assist with finding suitable service providers, covering everything from a CRM system and dataroom, web developers, to compliance and public relations agencies.

The focus can be tailored to suit your business needs and budget and I would be happy to discuss this with you. This could range from a start-up pack of documentation for a fixed cost, a few hours or full days every week or project based, either in your office or working remotely.

Please get in touch to see how **Carcie Consulting** may be able to help you:

email info@carcieconsulting.com or call +44 (0)7789691646



CARCIE ROGERS

I have over 24 years' experience in the alternative investment industry, focusing on Investor Relations, Marketing and Client Service. My expertise focuses on marketing infrastructure across private funds as well as publicly listed companies, working with leading hedge fund, private debt and real estate managers.

I am a Chartered Marketer (CMktr), a Fellow of the Chartered Institute of Marketing (FCIM), I hold the Investment Management Certificate, and a Professional Diploma in Digital Marketing.



2020-2023: Head of Investor Relations at Atrato Group Limited, a real estate investment adviser. I was responsible for the Investor Relations and Marketing function for the firm, managing a team of four, covering their flagship FTSE 250 listed vehicle, Supermarket Income REIT plc, and Atrato Onsite Energy plc, the largest funder of commercial onsite energy in the UK.

2018-2019: Partner, Head of Investor Relations at Foxford Advisors LLP, a newly established private debt manager focusing on the small to mid-market in Europe. I was responsible for all aspects of sales and marketing for the firm.

2014-2018: Director, Investor Relations at Pemberton Capital Advisors LLP, a private debt firm focusing on the European mid-market. I was responsible for marketing, client relations, events and corporate communications.

2009-2014: Head of Investor Relations at BlueBay Asset Management LLP, I was responsible for all clients globally invested in their range of hedge funds and private debt funds, coordinating investor and operational due diligence and was the main point of contact for all alternative clients.

2007-2008: Senior Director, Distribution at IGS AIS LLP, focusing on raising assets for hedge funds, funds of hedge funds and real estate funds to institutional investors across Europe.

2003-2007: Head of Investor Relations (FOHF) at Pioneer Alternative Investments, for the Momentum Fund of Hedge Fund product range, as a member of the investment team and responsible for the dissemination of all marketing information.

2000-2002: Alternative Investment Analyst and Product Specialist at Baring Asset Management, responsible for all marketing literature and analysis for their funds of hedge funds

1998-2000: Marketing Research Analyst at Liberty Ermitage UK Limited, assisting in institutional sales in Europe and the Far East for their range of hedge funds.

I graduated from the University of Surrey with a BA (Hons) in Marketing, French and Spanish.