HEIDI BRYANT

Castlestone Asset Management.

Two case studies. One firm. Two very different briefs.

A founder-led asset manager based in the British Virgin Islands, sponsored by Angus Murray (ex-President of Macquarie Bank, USA). I led marketing across two distinct phases of the business — first the rebrand and global fund distribution programme, then external communications during FSA action.

Both case studies are written here. The first stands on its own as a marketing strategy and brand engagement. The second is a separate credential — the kind of work that matters specifically to financial-services clients who may one day need someone with crisis-communications experience in the room.

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CASE STUDY 01 · ASSET MANAGEMENT · REBRAND AND DISTRIBUTION

Rebrand and global fund distribution.

Castlestone Asset Management — 2010 to early 2011. A complete brand and marketing system, two fund launches, and a tier-one press programme.

THE CHALLENGE

Castlestone Asset Management was a boutique BVI-based asset manager with real investment IP — particularly in precious metals, gold and emerging markets — but with a brand and marketing system that hadn't kept pace with the firm's ambitions. CEO Angus Murray (ex-President, Macquarie Bank USA) wanted to take the firm into the global IFA, fund-manager, family-office and wealth-adviser market with two priority fund launches: a Next 11 emerging markets fund (the post-BRIC growth story) and the Aliquot Gold & Precious Metals Equities Fund.

A seven-month brief to rebuild from the ground up: rebrand the firm, build the marketing strategy and system, launch the two funds, and put the firm and its founder on the map across the financial trade and consumer press.

WHAT I DID

Led the work end to end — brand, strategy, distribution programme, content system, fund launches and the PR communications programme that surrounded all of it.

Same firm, more entry points: a new visual identity and brand system designed for an institutional audience; a marketing strategy with positioning, audience definition, channel plan, and a fund-flow calendar that tied the marketing rhythm to the commercial rhythm; full launch toolkits for both new funds, including brochures, factsheets, commissioned imagery, sales presentations, online and print advertising, and an email programme into the firm’s global adviser database. The Aliquot launch was anchored by a journalist briefing event in March 2011 that secured single-byline launch-day coverage in Investment Week. The PR programme worked the trade and consumer financial press in parallel — the Financial Times (a profile of Angus Murray, “Believer in real assets”, 22 May 2011), Investment Week, Money Marketing, Hedgeweek, Trustnet, International Adviser and FinanceAsia. Asset TV carried founder video interviews into the UK IFA broadcast audience.

SELECTED PRESS PLACEMENTS

Financial Times	"Angus Murray: believer in real assets" — founder profile, 22 May 2011
Investment Week	"Castlestone launches precious metals equity fund" by Hannah Smith, 21 March 2011 (launch day)
Investment Week	"Castlestone Next 11 goes defensive in the face of equity anxieties in EMs"
Money Marketing	Fund analyses on the Next 11 and Aliquot Precious Metals UCITS launches; opinion piece on Angus Murray ("Castlestone keeper")
Hedgeweek	"Castlestone provides sterling and euro exposure to gold and precious metals"
Trustnet	"Meet the manager: Angus Murray, Castlestone Management"
International Adviser	"It's time to return to emerging markets: Angus Murray"
FinanceAsia	Founder interview piece on alternative-asset investing

Asset TV	Founder video interviews — UK IFA broadcast platform

WHAT WAS NEW ABOUT IT

Three things, none of which existed at Castlestone before this engagement:

- A consistent visual identity and brand system across the firm, its funds and its founder — the same firm reading the same way in a brochure, an FT profile or an Asset TV interview.
- A fund-flow calendar that tied marketing rhythm to commercial rhythm — campaigns scheduled to where the sales conversation actually was, not to where marketing wanted it to be.
- A press programme that put the founder and the firm in front of the audiences they needed to reach — from the Financial Times to specialist trade press to broadcast video on Asset TV.

RESULT

Two new fund products launched into a competitive adviser market, each with a complete commercial toolkit — brochures, factsheets, presentations, advertising, email, events and supporting PR.

A modern, defensible brand the sales team could lean on, with adviser engagement rebuilt across digital, print, broadcast and events.

A founder and a firm visible in the publications their global IFA, fund manager, family office and wealth-adviser audience actually read — including a profile of the CEO in the FT and single-byline launch-day coverage in Investment Week.

ENGAGEMENT

Sector	Financial services · asset management
CEO sponsor	Angus Murray
Period	2010 — early 2011
Duration	~7 months
Audience	Global IFAs · fund managers · family offices · wealth advisers
Markets	UK · EU · offshore IFA channels
Fund launches	Castlestone Next 11 Emerging Markets Fund · Aliquot Gold & Precious Metals Equities Fund

CASE STUDY 02 · ASSET MANAGEMENT · CRISIS COMMUNICATIONS

Crisis communications during FSA action.

Castlestone Asset Management — late 2011. External communications and stakeholder management through a live regulatory action and an orderly fund wind-down.

THE CHALLENGE

In July 2011, the FSA began investigating Castlestone Management. The firm's UK listed funds were subsequently wound down through the autumn. The marketing function had to pivot — within days — from a growth-stage launch programme into a crisis-communications operation, managing external communications with press, advisers, investors and distribution partners through a fast-moving and unprecedented situation.

The brief was no longer to grow. The brief was to preserve trust and run a clean process — to make sure that whatever happened to the firm in the regulatory environment, the firm's external behaviour through that process would be remembered as professional, accountable and orderly.

WHAT I DID

Led external communications throughout the action, working alongside the CEO, legal counsel and the operations team to design and run the communications response.

Same firm, very different brief: protect the firm’s reputation by being demonstrably professional in how it was wound down. Direct journalist relationships in the FT, Investment Week, Money Marketing and Citywire — proactive, consistent press handling rather than damage control. A proactive adviser communications programme into the firm’s IFA, distribution and channel partners through the regulatory action and into the wind-down, so advisers learned what was happening from the firm, not from the press. Investor communications timed and worded to keep confidence stable through the resolution process. And an internal coordination layer across the C-suite, sales, distribution and operations — single source of truth, single brand voice, no contradictory statements between functions. Through it all, the brand and the message held together.

WHAT WAS NEW ABOUT IT

Three things this brief required that the previous twelve months hadn’t:

- Communications inside a live regulatory frame — every external statement designed in parallel with legal and compliance counsel, within the bounds of what could be said.
- Crisis-grade speed — comms decisions made and executed within hours, not the typical weekly campaign rhythm.
- Stakeholder breadth — running press, adviser, investor and internal communications simultaneously as a single integrated function, where most operations have separate teams for each.

RESULT

The firm operated through an orderly wind-down rather than a disorderly collapse. Adviser, investor and press confidence in the firm's external conduct was protected through the action. Distribution channels remained stable through the transition. The UK arm continued to operate professionally for a meaningful period during the resolution process — a runway that was won, not given.

The work itself is largely confidential and necessarily under-described here. What's on the record publicly is what regulators and journalists wrote at the time. What's relevant from this engagement, for a future client, is the capability: senior marketing leadership working calmly inside legal, compliance and commercial constraints simultaneously, under time pressure, with the brand still standing at the end.

WHY THIS MATTERS AS A CREDENTIAL

Most marketers can launch a fund. Far fewer have led external communications during regulatory action against their employer. For financial services clients in particular — boutique asset managers, founder-led wealth firms, fintechs operating under emerging regulatory regimes — this is a capability that is not usually visible until it is needed, and when it is needed it is needed urgently.

Not every engagement will require it. But the engagements that do require it should know it exists.

ENGAGEMENT

Sector	Financial services · asset management
Capability	Crisis communications · stakeholder management · brand integrity
Period	Late 2011
Audience	Press · advisers · investors · distribution partners · regulators (indirectly)
Constraint	Live regulatory action · legal and compliance oversight throughout

Two case studies. One firm. Two very different briefs.

I led the marketing function at Castlestone Asset Management through both phases — first the rebrand and global fund distribution programme, then the external communications response during the FSA action and orderly UK wind-down.

The first case study is a standard senior-marketing engagement done well: brand, strategy, launches, distribution and PR, with measurable visibility in the publications that adviser audiences read. The second is a separate credential — the kind of work that some financial-services clients will specifically need, and that they will only know to look for once they understand it exists.

If you're a founder, partner or CMO in a regulated business and either of these stories sounds relevant, I'd be happy to talk.

CONTACT

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