



DG • ANALYTICS

SERVICES  
OVERVIEW

**DG Analytics, Inc. is ready to assist your firm in reaching your long-term growth goals through a broad range of consulting topics.**

**IS YOUR FIRM POISED FOR GROWTH? ARE YOU READY TO MOVE FORWARD TO A NEW LEVEL OF ASSET ACCUMULATION?**

DG Analytics can be your firm's gateway to new marketing opportunities and increased organizational efficiency. We will coordinate with any other consultants to your firm, or your in-house specialists in sales, marketing, communications or compliance for comprehensive coverage of your organization's requirements. We not only work hard with your team – we help your team work smarter.

**BRING DG ANALYTICS ON-BOARD!**

We provide personalized attention to issues affecting your firm and a focus on solving your problems. Our process can be as in-depth or general as your organization requires. Each agreement is adapted to the client's needs. Our goal is to be your best employee without the expense of medical benefits!

**WE CUSTOM-DESIGN ASSISTANCE FOR YOUR FIRM.**

Our clients are typically emerging investment management firms building assets and ready to market to a larger audience, or smaller departments in larger firms ready to expand marketing efforts from retail to institutional clients. DGA is the perfect solution for firms with increased demands on marketing and back office professionals, unexpected short-term deadlines, or an increase in business that necessitates immediate staffing. We are there for you when you need help, for as long as you need it.

**CREATIVE BUSINESS SOLUTIONS:**

In any of our areas of expertise we can run projects from start to finish, help get your in-house team started, assist you in selecting and/or hiring additional consultants or employees or work with your own home-town consultants to get the job done.

- Marketing: Strategies for your firm, quarterly updates, RFP and questionnaire writing and presentation materials design and production.
- Communications: Writing and editing, presentation coaching and training.
- Compliance: Initial guidance on SEC and AIMR compliance, compliance updates, business continuity planning, assistance on AIMR audit and disclosures preparation, assistance and planning for SEC audits.
- Information Management: Information systems design and implementation, database design and implementation, software selection research and software training

**GETTING STARTED**

- ▶▶ Please call for an introductory consultation to allow us to evaluate your needs and further describe services beneficial to your firm.
- ▶▶ References are available upon request.

DG Analytics can provide a proposal to your firm for consultation services. Elements considered in the cost structure of the proposal will include time for completion, complexity of consultation issues, duration of relationship (project or on-going) and payment structure.

PROVIDING THE  
ART AND SCIENCE  
OF ANALYSIS