



ISSUE

2024

TiAM Advisor Services

Editorial



As a leading quality provider, we have been successfully supporting asset managers with their sales activities for over 20 years.

Dieter-Thilo Fischer and Christoph Lang,
Managing Directors TAS

Are you Head of Sales at an asset manager? Or country head or responsible for marketing? Then you are right with us. We can support you with media, events and individual services.

your headquarters? She loves detailed reports and - especially - growing sales. We are happy to deliver the former. We do not promise increasing sales. But: We prepare these reliably so that you can concentrate on your sales targets.

Contents

2	Editorial
3	ÜBER UNS
4	MEDIEN
4	TiAM FundResearch
6	PartnerCenter
8	Exclusiv-Interview
9	Exclusiv-Mailing
10	Banner Ads
12	TiAM-Webinare + Leads
14	TiAM-Magazin
16	TiAM FundResearch 14Daily
18	EVENTS
18	Investment-Konferenz
20	TiAM Roundtable „Special“
22	TiAM Roundtable „365x5“
24	Services
24	LinkedIn
26	TiAM-TV
28	Annual packages
32	Content-Service
33	Reporting
34	€uro FondsNote
36	FVBS professional
39	Event overview for the year
39	CONTACTS

Information

All prices mentioned in the company brochure do not include the applicable statutory value added tax. Agency discounts on request.

In this brochure, the generic masculine is used for the sake of readability. Female and other gender identities are expressly included insofar as this is necessary for the statement.

About us

Exclusive • Independent • Innovative • Efficient access to target group



T IAM Advisor Services (TAS) is a media-, event- and services-company. We support private wealth managers, asset managers, financial advisors and institutional investors.

TAS interlocks valuable online-, print- and social-media-content into real media solutions. Our events bring countable success. Our services bring measurable value. We focus on active investment funds and ETFs.



TiAM FundResearch

Format: Multimedia-Channel



FundResearch home page



FundResearch daily newsletter

Traffic

- / PIs per month: **90,714**
- / Visits per month: **27.248**
- / Unique User per month: **Ø 19,916**

Status: Evaluation of clicks 1st half year of 2023

TiAM FundResearch is an online platform, reserved to wholesale distributors in the fund section. The editorial team writes the articles, and portfolio managers can supplement these with their own pieces of news or further informations.

USP:

Your news for asset managers, savings banks / banks and independent advisors will be distributed reliably by us and customized if desired.

Makers



Editorial team (from left to right): Peter Gewalt, Editor-in-chief, Angelika Bönisch, Marketing Assistance, Dirk Peter, editor social media and Jörn Kränicke editor in chief



More information

Web: www.fundresearch.de

Users

Independent financial advisors and bank consultants make up the lion's share of Users.

IFAs

55 %

BANK / SAVINGS BANK CONSULTANTS

15 %

PORTFOLIO MANAGEMENT COMPANIES

6 %

ASSET MANAGERS

7 %

INSURERS

4 %

FUND MANAGERS / CONSULTANTS

3 %

OTHER (E.G. FAMILY OFFICES)

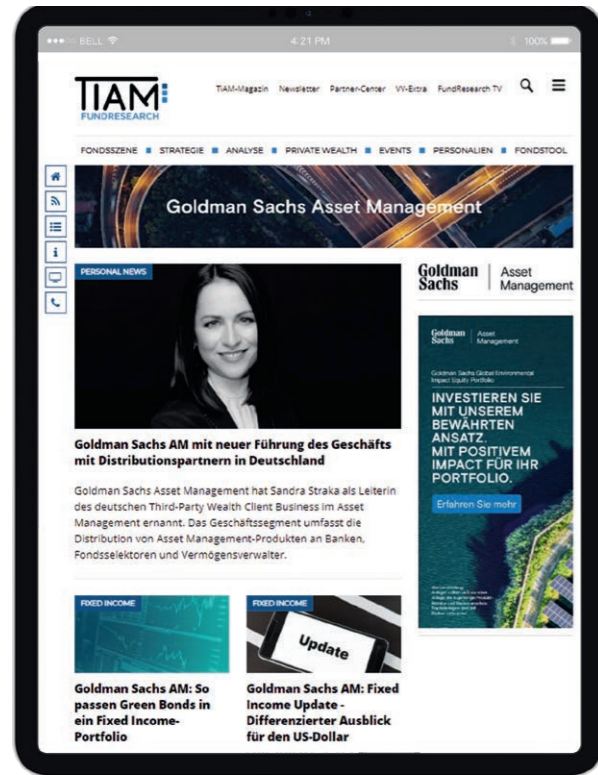
10 %

Source: TFR Daily User July 2022 (N = 8,900)

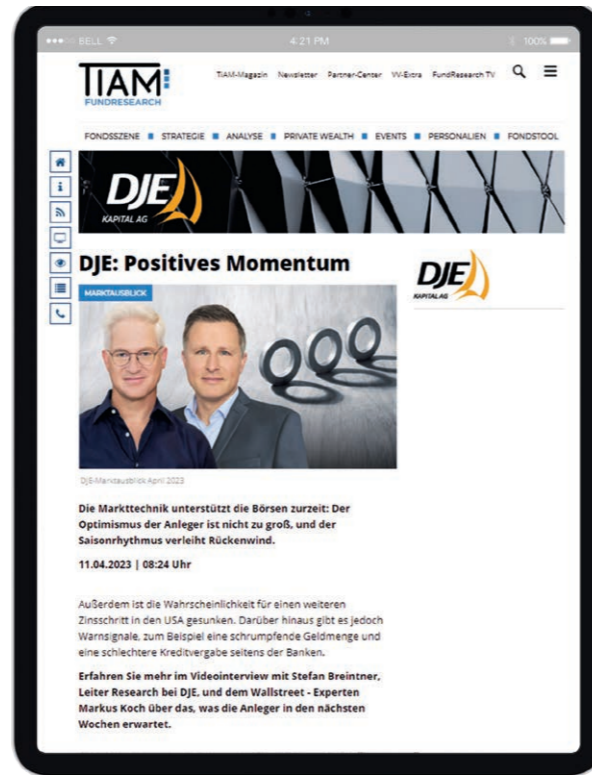


PartnerCenter

Format: The network tool for KVGs



FundResearch home page



News in the PartnerCenter

Facts

- / Ø PIs per PartnerCenter: **1,235 / month**
- / PIs PartnerCenter/
PIs FundResearch: **12.19 %**

Status: Evaluation of clicks 1st quarter of 2023

Rates

- / PartnerCenter: **18,900 € p. a.**
- / Exclusive mailing module: **3,900 € per issue**
- / Exclusive interview module: **3,900 € per issue**
- / TiAM-TV module **2,900 € per video**

TiAM FundResearch offers fund companies the opportunity to present themselves digitally as part of the PartnerCenter. The offer includes up to eight sections (company portrait, fact sheets, videos, news, events, etc.). In addition, the PartnerCenter serves as a communication tool: you provide current articles – we publish them on the start page plus twice in the daily newsletter.

USP:

Present your expertise with the PartnerCenter on the German-language fund portal for high-quality content.

Services

Basic package:

- / **PartnerCenter:** Presentation of the Portfolio Management Companies with up to eight sections, e.g. B. Company portrait, news, fund information, videos, events, etc.
- / **News:** Automated publication of your articles, columns, comments, etc. on the TiAM Fundresearch homepage in the "PartnerCenter News" section
- / **Newsletter:** Automated publication in our Daily-Newsletters

Maker



Angelika Bönisch, Marketing Assistance

Users

Independent financial advisors and bank advisors make up the majority of users (see p. 5).

Our partners

- / Alliance Bernstein
- / abrdn
- / Bakersteel Capital Managers
- / Bellevue Funds (LUX) SICAV
- / Capital Group
- / Carmignac
- / Columbia Threadneedle Investments
- / Comgest
- / Degroof Petercam SA
- / DJE Kapital AG
- / Donner & Reuschel AG
- / Edmond de Rothschild Asset Management
- / Goldman Sachs Asset Management
- / Greiff Capital Management AG
- / HANSAINVEST
- / IPConcept
- / KanAm Grund Kapitalverwaltungs-gesellschaft mbH
- / M&G Investments
- / Morgan Stanley Investment Management
- / ODDO BHF Asset Management
- / Pictet Asset Management
- / Pro BoutiquenFonds GmbH
- / Robeco
- / Shareholder Value management AG



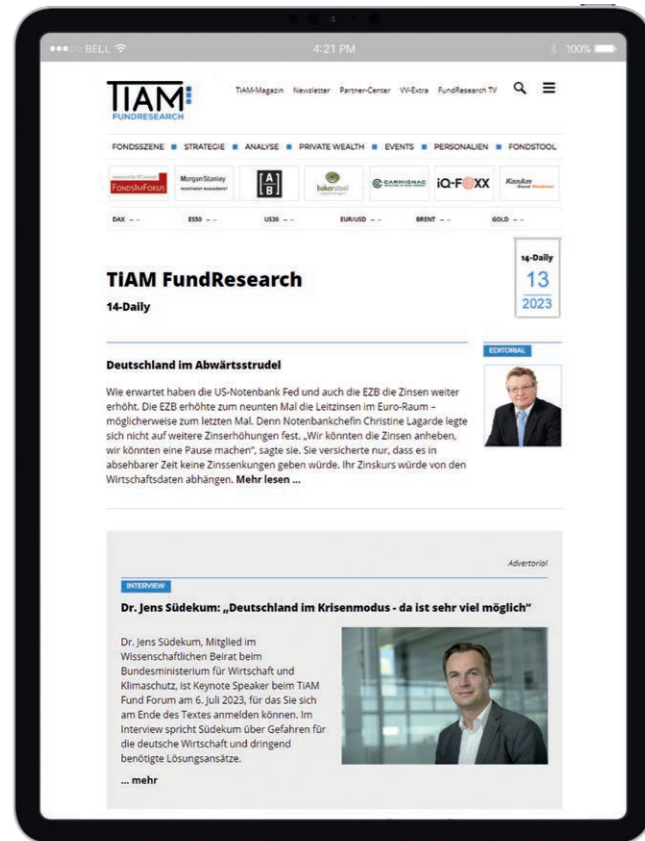
More information

Web: www.fundresearch.de/PartnerCenter/



Exclusive Interview

Format: Advertorial for PartnerCenter customers in TiAM 14-Daily

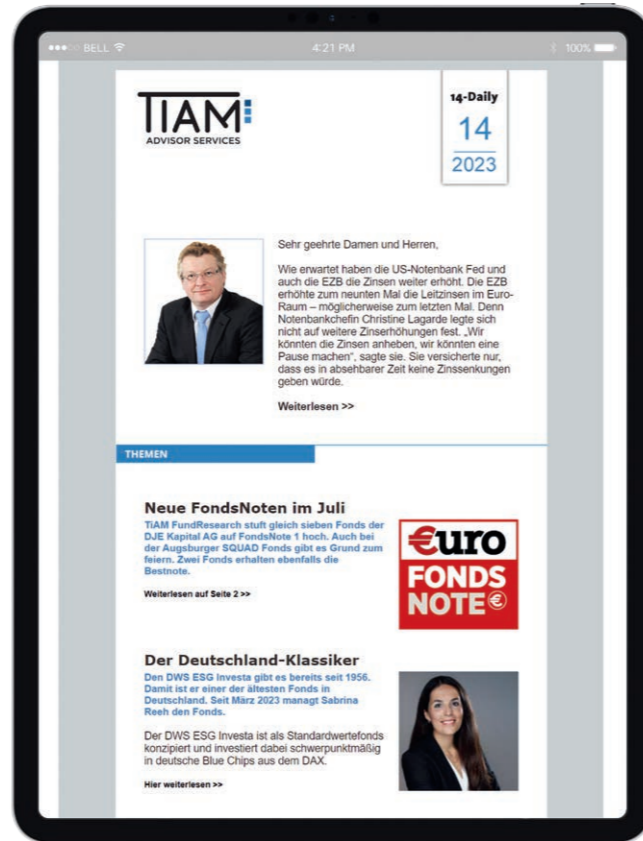


Advertorial in the 14-Daily newsletter

Facts

- / Recipients: **9,878 Subscribers**
- / Open rate: **28 - 33 %**
- / CTOR: **39 - 48 %**
- / Visits per month: **31,503**

Source: Evaluation of clicks 1st half year of 2023



14-Daily-Newsletter

Rates

- / Interview, specialist article or fund portrait incl. editing and advance online publication at TiAMFundresearch **3,900 €**

Big interview - big interest. The whole thing will be published both in TiAM Fundresearch and in the 14-Daily newsletter. We will also discuss this with your compliance department.



Exklusiv-Mailing

Format: Mailing



Exklusiv-Mailing

Facts

- / Recipient: **8,926 Subscribers**
- / Open rate: **15.02 % - 20.49 %**
- / CTOR: **3.96 % - 14.21 %**

Source: Evaluation of clicks
1. half year of 2022

Rates

- / per mail: **3,900 €**



More information

Web: www.fundresearch.de

For a successful mailing campaign, we offer partners the option of an exclusive stand-alone mailing via our mailing list. This expands the reach of your information to target groups. The focus of our mailing recipients is on IFAs, bank and savings bank advisors and asset managers.



Banner

Format: Banner ad at TiAM FundResearch

Display-Ads in rotation



Fireplace
 / Top-Banner at the top of the page
 1320 x 160 px
 / Skyscraper right and left 160 x 600 px



Wallpaper
 / Top-Banner at the top of the page
 1320 x 160 px
 / Skyscraper right 160 x 600 px



Skyscraper
 / right margin 160 x 600 px



Billboard
 / in the middle of the content 940 x 155 px

Traffic Display
 / Visits: **70 %**

Source: Evaluation of clicks 2022

Rates
 / Fireplace: **2.500 € / month**
 / Wallpaper: **2.000 € / month**
 / Skyscraper: **1.500 € / month**
 / Billboard: **1.500 € / month**

14Daily-Newsletter-Ads



Banner Daily-Newsletter
 / Billboard 600 x 150 px
 / Skyscraper 160 x 480 px

Preise
 / Billboard exclusive placement:
1,500 € / month
 / Skyscraper exclusive placement:
1,500 € / month

Facts
 / Recipient: **9.878 Subscriber**
 Status: July 2023

Daily Newsletter-Ads (daily 12 and 5 p.m. o'clock)



Banner Daily-Newsletter
 / Billboard 560 x 92 px
 / Vertical Banner 180 x 360 px

Rates
 / Billboard in rotation:
1,500 € / month
 / Vertical Banner: **1,500 € / month**

Facts
 / Recipient: **8.900 Subscriber**
 Status: July 2023

Mobile ads on request

Discount for Display-Ads:
 / **25 %** for PartnerCenter customers
 / **15 %** agency discount

You have the option of booking display and mobile banners. There are numerous possibilities for branding as well as performance-oriented campaigns. Our reports make your successes transparent and provide security.



TiAM-Webinars + Leads

Format: Webinar



Topic: Real estate with Nicolas Scherf / portfolio manager Janus Henderson and Rüdiger Sälzle, Managing Director FondsConsult

Traffic

- / Pls per month: **63,101**
- / Visits per month: **31,503**
- / Unique User per month: **Ø 19,656**

Status: Evaluation of clicks 1st half year of 2023

Rates

- / 1 x Webinar + Leads: **7.900 €**
- / 2 x Webinar + Leads: **11.900 €**
- / 3 x Webinar + Leads: **14.900 €**

Interested in 1st level leads? Book one or more webinars with us. These will be accompanied by a large media appearance. And: You generate 1st-level leads including email addresses and media workarounds.

Services

Before the webinar:

Article including registration at:

1. TiAM FundResearch (website)
2. TiAM 14-Daily
3. LinkedIn (2x).

→ Webinar 45 min incl. moderation

After the webinar:

Article about the webinar on TiAM FundResearch (website)

Maker



Peter Gewalt, Editor-in-Chief of the TiAM Group

USP:

Exclusive and personalized 1st-level leads on topics defined by Portfolio management companies. Multimedia performance included.



More information

Web: https://www.youtube.com/channel/UCPwPm_uU9nV-WwnWtISfYYJg



TiAM

Format: magazine



“Unfortunately, there are only very few publications in Germany that are dedicated exclusively to the fund industry. TiAM is one of these, and offers a platform for reaching professional investors through a relevant editorial setting.”

Jan Wilch, Fundamental Media

The magazine TiAM, which appears five times a year, is aimed at professional investors in German-speaking countries. TiAM provides in-depth, first-hand expertise. Experts discuss and write here. Industry insiders prepare specialist articles or give interviews.

Facts

- / Frequency: **Quarterly**
- / Distribution: **controlled circulation**
- / Circulation Print: **6.585**
- / Circulation E-Paper: **3.555: 10.000**
- / Web site: **www.fundresearch.de/tiam/**

Rates

- / Inside page ads: **3,900 €/pages**
- / Cover page ads: **4.900 €/pages**
- / Specialist article, interview or Tacheles: **6,900 €/4 pages**
- / Specialist article or Interview: **3,900 €/2 pages**
- / Content Pack „Basic“: **4,900 €/2 pages** article and extension of the article on FundResearch.de
 - Additional module LinkedIn: **1,250 €/Post**
 - Additional module newsletter 14-Daily: **1,200 €/2 page** extension
 - Additional module Exklusiv-Mailing: **3,900 €/Mailing**
- / Content package „Basic“ plus all additional modules: **11,250 €**

More details and ad formats:
www.fundresearch.de/tiam/media.php

Reader

The mailing list is accurate maintained and regularly updated. Only professionals and semi-professionals receive TiAM.

GERMANY

67,5 %

AUSTRIA

16,1 %

SWITZERLAND

15,2 %

OTHERS

1,2 %

Makers



Uli Kühn, Editor-in-Chief (left) and Ronny Kohl, Co-Editor-in-Chief

Structure

This breakdown shows that most TiAM readers manage client funds for large institutional investors and asset management businesses.

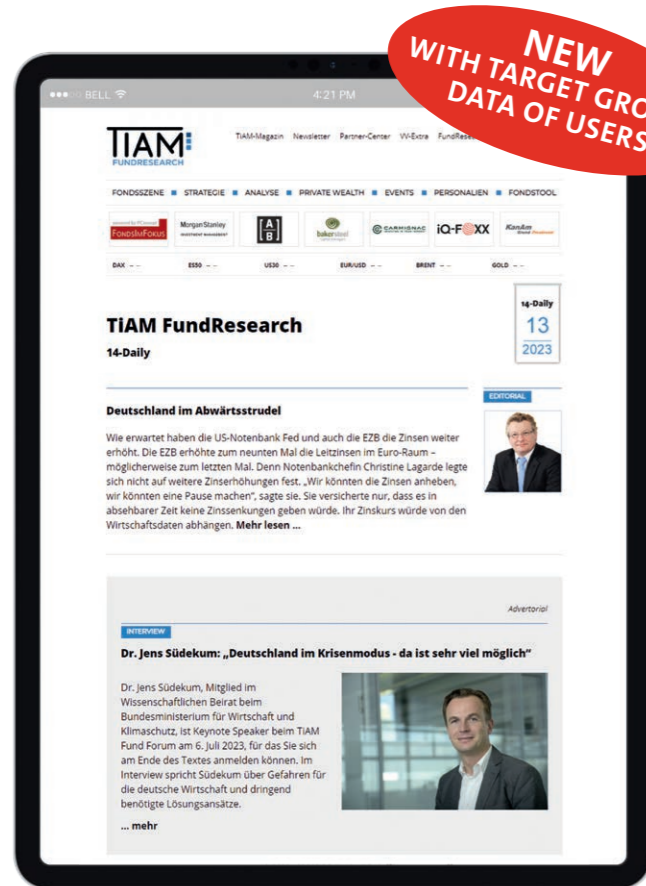
	Persons
Assetmanager/Fonds ■ 9,2 %	925
Bank/Private Wealth ■ 19,5 %	1,965
Consultants ■ 14,2 %	428
Family Office ■ 3,2 %	325
Church/Organization ■ 3,1 %	315
Pension fund ■ 4,4 %	448
Savings bank ■ 18,2 %	1.840
Foundation ■ 2,1 %	214
Corporate/Treasury ■ 2,8 %	296
Pension scheme ■ 3,1 %	318
Wealth manager ■ 20,2 %	2,086
Insurance ■ 3,4 %	352

Quelle: Evaluation July 2023



TiAM Fund-Research 14-Daily

Format: Digital newsletter



Facts

- / Recipients: **9,878** Subscribers
- / Open rate: **28 - 33 %**
- / CTOR: **39 - 48 %**

Source: Evaluation of clicks 1st half year of 2023

Rates

- / Interview, specialist article or fund portrait incl. editing and advance online publication at TiAMFundresearch **€ 3,900**
- / Banner: Billboard 4 issues **2,500 €**
- / Banner: Right edge 4 issues **2,000 €**

USP:

The best of the editorial and research department. Every 14 days. Digital.

Maker



Jörn Kränicke, editor in chief



More information

Internet: www.fundresearch.de/tiam/media.php

Reader

The focus is on financial advisors, private wealth managers at banks and savings banks, and asset managers.

IFAs

53 %

BANK / SAVINGS BANK CONSULTANTS

19 %

ASSET MANAGERS

8 %

PORTFOLIO MANAGEMENT COMPANIES

5 %

INSURERS

4 %

FUND MANAGERS / CONSULTANTS

2 %

OTHER

10 %

Source: TFR 14-Daily Abonnenten 2022 (N=9,324)

TiAM Fundresearch 14-Daily shows fortnightly the most read articles at TFR. Plus EXTRA tips from the editors and exclusive results from the research department.



Investment Conference

Format: Conference two days



Dates 2024

- / February 16th and 17th on Schloß Hohenkammer
- / April 11th and 12th at Tegernsee
- / June 27th und 28th Juni at Berchtesgaden
- / October 12th and 13th at the Alpsee

Rates

- / per Conference **24,500 €**

The (FondsConsult) Investment Conference is a two-day event moderated by the Managing Director of FondsConsult, Rüdiger Sälzle. In addition to the neutral keynote lectures presented by fascinating speakers, six asset managers talk to the audience about their respective areas of expertise, followed by a Q&A session.

Locations

- » **Hohenkammer:**
Schloss Hohenkammer
- » **Rottach-Egern:**
Althoff Seehotel Überfahrt
- » **Berchtesgaden:**
Kempinski Hotel
- » **Schwangau:**
AMERON Neuschwanstein Alpsee

Makers



Gabriele Kick, Head of Events and Rüdiger Sälzle, Managing Director of FondsConsult Research



More information

Web: <https://events.advisor-services.de>

Participants

Effective access to selected fund selectors (asset managers, banks, savings banks, family offices, fund of funds managers) in an exclusive atmosphere.

ASSET MANAGERS

50 %

BANKS AND SAVINGS BANKS

35 %

FUND OF FUNDS

10 %

FAMILY OFFICES

5 %

Source: Evaluation of 2022

Services

- / Invitation management
- / Exclusive location including catering
- / Keynote speaker and macro lecture
- / Supporting program including dinner
- / Moderation by Rüdiger Sälzle, FondsConsult
- / Complete organization
- / Hotel room incl. meals for two representatives of the house
- / Presentation area
- / Handout of addresses
- / Current reporting and summary of the speakers' presentations (one article for each KVG) on www.fundresearch.de
- / Short videos with the speakers
- / Article in TiAM about the event (print and e-paper) with fund portrait (incl. QR code)



TiAM-RoundTable „Special“

Format: Roundtable 0,5 days



Dates 2024

31/01/2024 appears in issue 01,
Topic: The USA in the 2024 election
year – What impetus investors can
expect from the presidential elections
in autumn –
Hosted by: Peter Gewalt

28/04/2024 appears in issue 02,
Topic: Real Estate –
Hosted by: Rüdiger Sälzle

16/10/2024 appears in issue 04,
Topic: Capital market strategy 2025 –
Hosted by: Dr. Michael Heise

Price

/ per roundtable: 7,450 €

TAS organizes a round table for up to five asset managers on a topical and interesting topic. The sales/country bosses exchange views on the current status and further development of the respective topic, moderated by TAS.

Included in the price:

„Special“ media package:

- A. TiAM coverage (6 pages of general reporting, including one fund portrait per partner)
- B. Fund portrait on www.fundresearch.de
- C. Social media integration (LinkedIn) of the fund portrait

Your benefits

- >> *Technical exchange in small groups*
- >> *Target group-oriented coverage*
- >> *Presentation of your fund portrait in thematic context*
- >> *High visibility through the use of different channels*

Maker



Peter Gewalt, Editor-in-Chief of the TiAM Group



More information

Web: www.fundresearch.de/tiam/



TiAM-RoundTable „365 x 5“

Format: Roundtable 3 per year



Dates 2024

14/02/2024 appears in issue 01,
Topic: AI revolution – what opportunities the rapid development of artificial intelligence offers investors

14/05/2024, appears in issue 02,
Topic: Non-event or game changer – how investors see the US presidential election at the end of 2024 should be considered in the portfolio

30/09/2024, appears in issue 04, Topic: Product innovations - the most important fund innovations

INKL. TIAM-TV-VIDEO + PARTNERMEETING (WIESN)

Price

/ all roundtables: **18,900 €**

Moderation of the roundtable: Peter Gewalt (Chefredaktion TiAM-Gruppe)

TAS accompanies up to five asset managers for a year. For this purpose, the group meets three times as part of a round table and exchanges views on current and interesting topics. The sales/country bosses discuss the current status and further development of the respective topic.

Included in the price:

„Special“ media package:

- TiAM coverage (6 pages of general reporting, including one fund portrait per partner)
- Fund portrait on www.fundresearch.de
- Social media integration (LinkedIn) of the fund portrait
- TiAM TV production on the subject of product innovation (per partner)
- Partnermeeting

Your benefits

- >> *Technical exchange in small groups*
- >> *Target group-oriented coverage*
- >> *Presentation of your fund portrait in thematic context*
- >> *High visibility through the use of different channels*

Maker



Peter Gewalt, Editor-in-Chief of the TiAM Group



More information

Web: www.fundresearch.de/tiam/



LinkedIn

Format: Social-Media-Service



Facts

- / Upload article: **TiAM-GF + TiAM weekly**
- / Follower: **12,500 + 1,500**
- / Kontakte: **12,700 + 1,600**

Stand: LinkedIn-Report, August 2023

Rates

- / Full Service: **12,900 € p. a.** (1 post every 14 days)
- / Sponsored Post: **1,250 €**

We write articles and post photos, graphics and events on the TiAM Advisor Services LinkedIn platform. Our exclusive offer to fund- and insurance companies, insurance companies, issuers and asset managers is unique: you address the target group we serve in a dedicated, efficient and professional manner.

“We support customers via our LinkedIn platform who do not want to venture into social media marketing, be it because they lack the time or cannot guarantee the same level of professionalism themselves.”

Dieter Fischer,
Managing Director TiAM Advisor Services

Maker



Dieter-Thiolo Fischer, Managing Directors TAS



More information

Web: <https://bit.ly/2kDiQ13>

Reader

Sharp focus on private wealth managers, asset managers, family offices, IFAs and fund of funds managers.

WHOLESALES

93.6 %

OTHER

6.4 %

Source: LinkedIn 2023

Structure

Independent Financial Advisors (IFAs) and bank and savings bank consultants make up the largest group of readers.

	Persons
Assetmanager/Fonds 8,8 %	1.232
Bank/Private Wealth 20,6 %	2.884
Family Office 2,7 %	378
Saving banks 21,4 %	2.996
Wealth manager 20,8 %	2.912
IFA 14,7 %	2.058
Corporate/Treasury 4,8 %	672
Others 6,4 %	896

Quelle: LinkedIn 2023



TiAM-TV

Format: Video-Service



Video 90 Sek, zwei bis drei Fragen. Themen werden abgestimmt

Rates

PartnerCenter customers:

- / 1x: 2,900 €
- / 2x: 5,500 €
- / 3x: 7,900 €

Source: Price list 2022

Other:

- / 1x: 3,900 €
- / 2x: 7,500 €
- / 3x: 9,900 €

Short, concise, strong video interviews attract attention. We produce these in our own studio. You address the target groups we care for in a dedicated, efficient and professional manner.

USP:

TiAM-TV enables fast, concise videos for online, marketing and social media appearances.

After video recording:

5 strong followers

1. Including installation in the PartnerCenter
2. Archive: Under TiAM-TV on fundresearch.de
3. Large article, including photos + video at fundresearch.de
4. Article about it, incl. photos + video on LinkedIn
5. Article, incl. photos + video as Exclusiv-Mailing

Maker



Dirk Peter, editor social media



More information

Web: www.fundresearch.de/tv



Annual packages

Format: Cross media



Reach target groups with private wealth managers, asset managers, financial advisors and institutional investors with our packages. Combine online, print and social media content into real media solutions. Our services offer measurable value and focus on active investment funds and ETFs.



Package Platinum

- / Annual agreement PartnerCenter (details page 4-7)
 - / 2 x Exclusive-Mailing (details page 9)
 - / 1 x TiAM-TV (details page 26-27)
 - / 5 x Top-Banners (Fireplace), runtime: 1 month each on www.fundresearch.de (details page 10-11)
 - / 2 x content package „Basic“ + 2 additional modules (details page 14-15):
- 2-page interview or technical article in the TiAM magazine and 1:1 publication on www.fundresearch.de**

Module 1:

1:1 extension in the 14-daily newsletter as „top pick of the editors“

Module 2:

LinkedIn post in the form of a mini e-paper (TiAM cover including eye-catcher with customer logo and link to desired URL.)

- / 2 x LinkedIn post (details page 24-25)
- / 5 x advertisements in the daily newsletter, runtime: 1 month each (details page 10-11)

Rates

- / Package price platinum: **61,000 €** (regular 67,800 €)*

Individually to your company coordinated package on request. Contact us!

* Individual modules within the package are understood to be less AE commission. Details on request. All prices do not include VAT.

Contact person



Belinda Lohse, Head of advertisements / Object Management TiAM

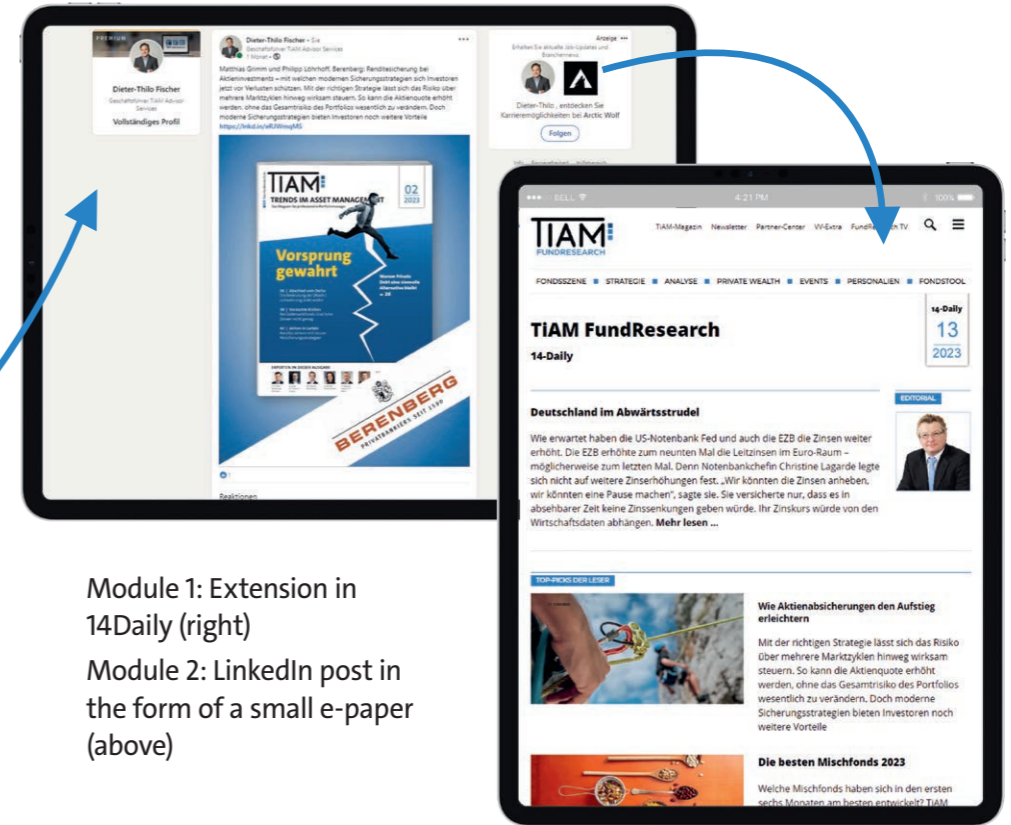
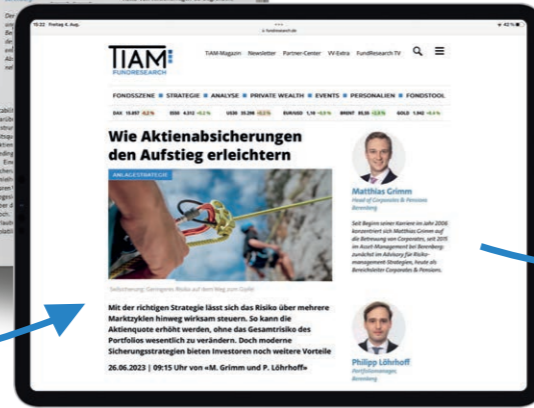
Your benefits

- >> **Maximum reach by using different channels**
- >> **Measurable success through meaningful reports**
- >> **high visibility with little effort**
- >> **Target group oriented marketing**
- >> **Tailor-made package for your needs**

PACKAGES



Two-page interview or technical article in TiAM magazine and 1:1 publication on www.fundresearch.de



Module 1: Extension in 14Daily (right)
Module 2: LinkedIn post in the form of a small e-paper (above)

PACKAGES

Package Gold

- / Annual agreement PartnerCenter (details page 4-7)
- / 1 x Exclusive-Mailing (details page 9)
- / 1 x TiAM-TV (details page 26-27)
- / 2 x Top-Banners (Fireplace), runtime: 1 month each on www.fundresearch.de (details page 10-11)
- / 2 x content package „Basic“ + 2 additional modules (details page 14-15):
- 2-page interview or technical article in the TiAM magazine and 1:1 publication on www.fundresearch.de**
- Module 1:** 1:1 extension in the 14-daily newsletter as „top pick of the editors“
- Module 2:** LinkedIn post in the form of a mini e-paper (TiAM cover including eye-catcher with customer logo and link to desired URL.)
- / 2 x LinkedIn post (details page 24-25)
- / 2 x advertisements in the daily newsletter, runtime: 1 month each

Rates

/ Package price gold: **49,300 €** (regular 51,900 €)*



Package Silver

- / 2 x Top-Banners (Fireplace), runtime: 1 month each on www.fundresearch.de (details page 10-11)
- / 2 x content package „Basic“ + 2 additional modules (details page 14-15):
- 2-page interview or technical article in the TiAM magazine and 1:1 publication on www.fundresearch.de**
- Module 1:** 1:1 extension in the 14-daily newsletter as „top pick of the editors“
- Module 2:** LinkedIn post in the form of a mini e-paper (TiAM cover including eye-catcher with customer logo and link to desired URL.)
- / 2 x LinkedIn post (details page 24-25)
- / 2 x advertisements in the daily newsletter, runtime: 1 month each

Rates

/ Package price silver: **24,400 €** (regular 25,200 €)*



* Individual modules within the package are understood to be less AE commission. Details on request. All prices do not include VAT.

CONTENT-SERVICE

Format: TiAM-Service



Rates

- / Use within the TiAM group per article: 490 €
- / free use per article: 590 €
- / Minimum quota: 5,900 € p.a.

Rates for PartnerCenter customers

- / Use within the TiAM group per article: 390 €
- / free use per article: 490 €
- / Minimum quota: 3.900 € p.a.

Maker



Peter Gewalt, Editor-in-Chief of the TiAM Group



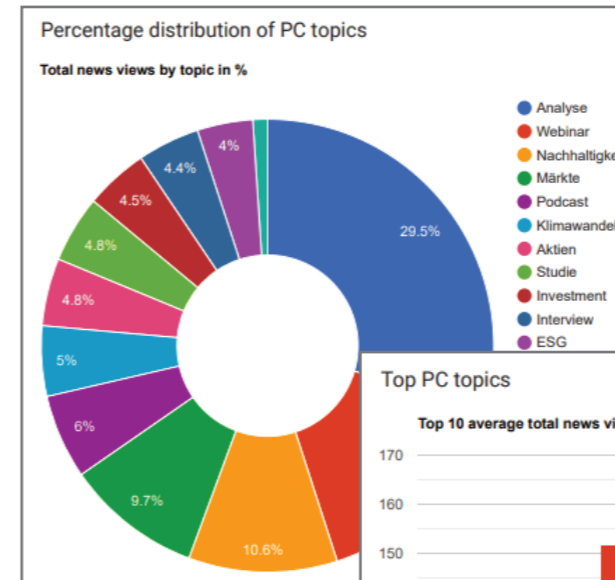
More information

WEB: www.fundresearch.de/PartnerCenter/

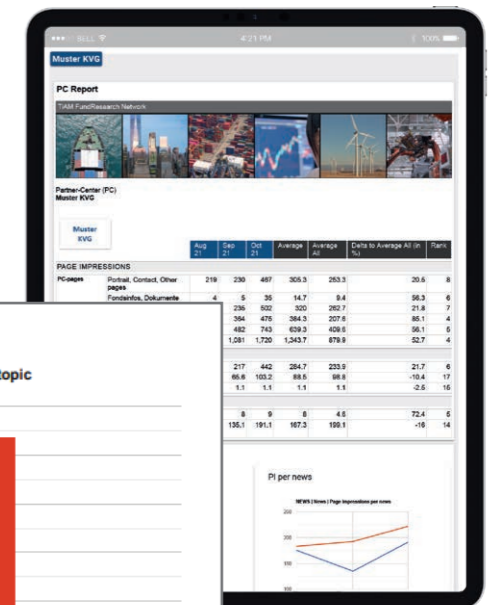
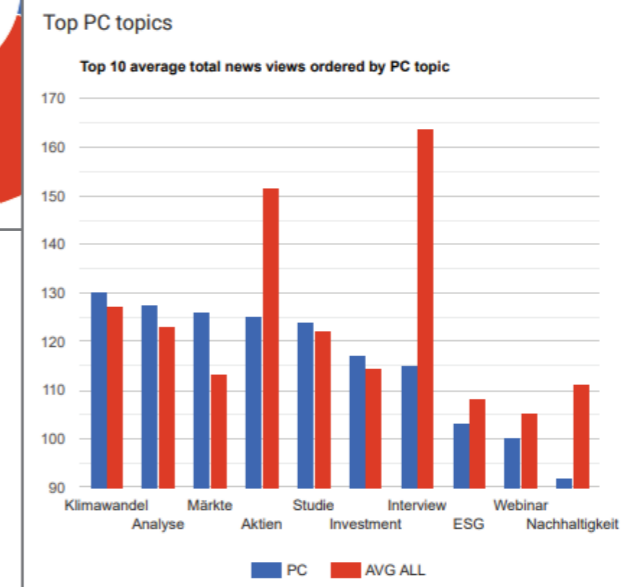
So you have content in German, English or French? However, these are not suitable for public use? We do it for you. Our special content team will write articles for you in consultation with you - and publish them, for example, in your TiAM PartnerCenter.

REPORTING

Format: TiAM-Service



PartnerCenter-Reporting



Facts

- / Available for PartnerCenter, LinkedIn, webinar and banner formats etc
- / selectable monthly and quarterly
- / Scope variable up to 10 pages

Maker



Christoph Lang, Managing Director TAS

€URO FondsNote

Rating by Finanzen Verlag, TiAM Advisor Services and FondsConsult



Facts

- / Target group: **Portfolio management companies**
- / Current customer base: **32**
- / Fund data: **Mountain-View Data**
- / Web site: **www.fondsnote.de**

Rates

- / 1-25 funds: **2,900 € p. a.**
- / 26-50 funds: **5,900 € p. a.**
- / 51-100 funds: **8,900 € p. a.**
- / über 100 funds: **11,900 € p. a.**

New: incl. editorial contribution to the rated fund(s) on fundresearch.de

The Euro FondsNote fund rating is published since 2002. This rating service assesses funds over a period of four years, with quantitative criteria accounting for 70 percent of the assessment. Qualitative criteria make up 30 percent of the rating. This unique approach sets FondsNote apart from run-of-the-mill fund ratings.

USP:

The Euro FondsNote rating separates the wheat from the chaff. Only funds with an excellent risk-return profile rated as outstanding within their fund category are worthy of the top Euro FondsNote score of 1, meeting both quantitative and qualitative criteria.

Maker



Jörn Kränicke, editor in chief

Evaluation criteria

The Euro FondsNote evaluates funds over a period of four years. In addition to quantitative (70%), the calculation is also based on qualitative (30%) criteria, which sets the Euro FondsNote apart from comparable ratings. The aim is to identify the most sustainable and successful funds from the various peer groups from the mass of funds offered in Germany and to help distinguish them from the short-term high-flyers. By constantly updating the data, the fund selectors and investors are promptly informed about revaluations and devaluations.

Reader

€uro, €uro am Sonntag, BÖRSE ONLINE, boerse-online.de

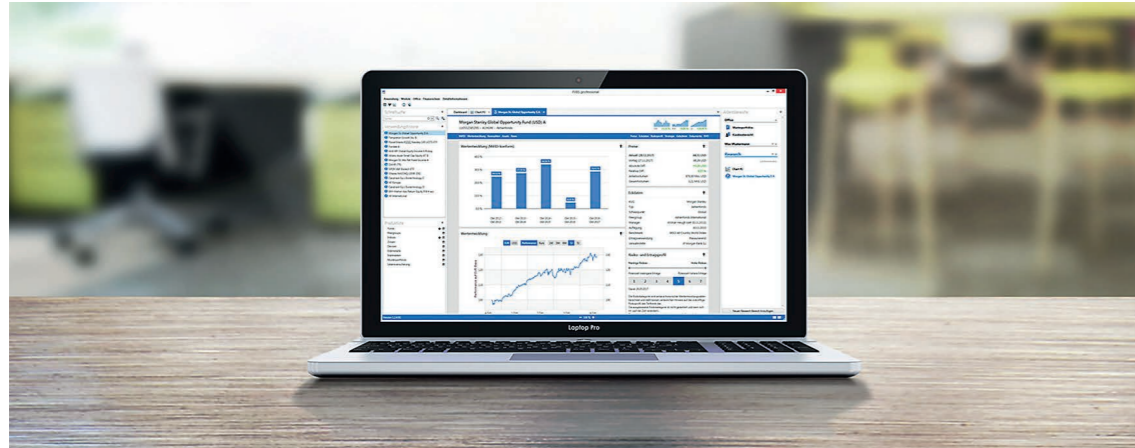


More information

Web: www.fondsnote.de

FVBS professional

Publisher: TiAM Advisor Services / Developer: Edisoft Format: Software



Facts

FVBS licenses including modules: 1,125
Website: www.fvbs.pro

Source: July 20223

Rates

- / Per license: **59.90 € per month**
- / Advice module: **19.90 € per month**
- / Documentation module: **11.90 € per month**
- / Banking module: **9.95 € per month**

FVBS professional is the independent investment software for financial advisors and asset managers with daily updated ETF and fund key figures for creating professional fund analyses. With MiFID II compliant investment recommendations and fact sheets. Including real estate returns in large and medium-sized cities, international benchmark indices. And with model portfolios and banking interfaces for accessing customer accounts.

USP:

Independent fund analysis for fund professionals with unique evaluation options.

Maker



Christoph Lang, Head of Operations, TAS

Users

The vast majority of users are independent financial advisors.

FINANCIAL ADVISORS UNDER GERMAN LAW (ART. 34d,f,h)

85 %

ASSET MANAGERS

8 %

SAVING BANKS / BANKS

3 %

PORTFOLIO MANAGEMENT COMPANIES

2 %

OTHER

2 %

Status: July 2022












More information

Web: www.fvbs.pro

Event overview for the year

-  PRINT
-  FUNDRESEARCH.DE
-  BANNER
-  NEWSLETTER
-  EXCLUSIVMAILING
-  VIDEO-EVENT
-  PRESENCE-EVENT

- 
31/01/2024
RoundTable „Special“
- 
14/02/2024
RoundTable „365x5“
- 
22-23/02/2024
Investment Conference Schloß Hohenkammer
- 
18-19/04/2024
Investment Conference Tegernsee
- 
24/04/2024
RoundTable „Special“
- 
14/05/2024
RoundTable „365x5“
- 
27-28/06/2024
Investment Conference Berchtesgaden
- 
30/09/2024
Roundtable „365x5“
- 
16/10/2024
RoundTable „Special“
- 
17-18/10/2024
Investment Conference Alpsee

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