

***“Our goal is to meet our client’s specific asset targets and close their product to new assets in three to five years.”***

## CREDENTIALS

**Third Party Marketing Experience**

- Founded in 1995, independently owned
- Three experienced sales professionals
- \$3+ billion raised by Arrow, \$10+ billion raised during principals careers
- Securities distributed by Arrow Investments, Inc., Member FINRA, SIPC

**Dedicated U.S. Institutional and Wealth Management Sales Focus**

- More than 10 years of proprietary sales meeting notes
- Qualified distribution to 2000+ institutional investors and RIAs
- Comprehensive sales & marketing support

**Industry Leadership**

- Founding member of Third Party Marketing Association (www.3pm.org)
- **“Third Party Marketer of the Year”**: Emerging Manager’s Summit May 2007
- Articles published in: MFA Reporter, Emerging Manager Monthly, Quoted in: Forbes, InvestmentNews, Pensions and Investments and FundFire

## PRINCIPALS

**Steve Rubenstein**

- 25 years industry experience
- Founded Arrow in 1995
- Lehigh University, BS in Finance 1984
- Securities licenses: 24, 7, 63
- Past President, Third Party Marketing Association

***steve@arrowpartners.com***  
**(914) 251-1084 ext. 12**

**Ken Rogers**

- 24 years industry experience
- Joined Arrow in 1998
- Muhlenberg College, BA in Communications 1985
- Securities licenses: 24, 7, 63

***ken@arrowpartners.com***  
**(914) 251-1084 ext. 11**

**Stacy E. Havener**

- 11 years industry experience
- Joined Arrow in 2009
- Western CT State University, BA in English 1998
- Securities licenses: 24, 6, 7, 63
- Board Member, Third Party Marketing Association

***stacy@arrowpartners.com***  
**(617) 859-3777**

## TESTIMONIALS

*“Arrow Partners’ institutional marketing expertise was key to WCM meeting its small cap growth and client diversification goals.”*

***Linda Selegue – Washington Capital Management***

*“Arrow is dedicated 24/7 on increasing our assets under management. Their well designed sales and marketing strategy has put us in a position to compete for new accounts and meet our growth goals.”*

***Mary Lisanti – AH Lisanti Capital Growth LLC***

*“Arrow has delivered large institutional relationships at important stages in our firm’s growth.”*

***Arnie Schneider – Schneider Capital Management***