

“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
- Two experienced sales professionals
- \$2 billion raised by Arrow, \$7+ 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

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Ken Rogers

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

ken@arrowpartners.com
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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