

LIPPER BRANDING INFORMATION AND FAQ



Lipper Branding - Information and FAQs

Overview – Lipper has a new brand identity!

Lipper has been designated a flagship brand. Lipper is a highly valued asset in the Thomson Reuters portfolio and the flagship designation confirms the company's ongoing commitment to, and strong belief in, the brand. This designation will help in our efforts to expand the brand into new customer segments and further our ability to differentiate our products and services in the marketplace.

What is a flagship brand?

Flagship brands are key brands in the Thomson Reuters brand portfolio that capitalize on significant existing brand recognition and serve as banner products for the Thomson Reuters brand. As such, flagship brands have a responsibility to generate brand value for both the flagship brand and for Thomson Reuters. Flagship brands are few in number and in addition to Lipper include Eikon, WestLaw, Accelus and ONESOURCE.

What are our goals for the flagship brand?

Our objective is to extend the Lipper flagship brand so we can grow our business in new directions and target new customer segments including wealth managers, independent advisors/RIAs and investors. Essentially, we will be:

- Building and extending Lipper's positive brand perception in the wealth management segment while reinforcing our existing position in the investment management segment.
- Extending Lipper products and content into the wealth management segment by leveraging Thomson Reuters desktop, online portals, digital media, Reuters News platforms and Media partnerships
- Strengthening associations between Thomson Reuters and Lipper to increase perceived customer value, and build customer loyalty and trust.
- Positioning Lipper as the higher value, higher quality brand than competing brands in the investment management and wealth management segments.

Why is Lipper changing the logo?

Our aim is to enhance the perceived brand value to customers and increase customer loyalty by strengthen associations between Thomson Reuters and Lipper. To achieve this goal, Lipper is aligning its brand identity more closely with the Thomson Reuters master brand. The flagship brand will enable Lipper to strengthen its brand power in new and existing markets and customer segments. The brand marketing program will target investment managers, wealth managers, independent advisors and investors globally.

When will the new logo be available?

The new logo will be available on August 3, 2011.

An email announcement will be distributed globally to our existing clients and media partners on August 9, 2011 to notify them about the new logo and change requirements. We will send

periodic reminders to our clients and media partners on a monthly basis through the remainder of the year.

Where can I download the new logos?

On August 3, 2011, the new logos and accompanying usage guidelines along with examples will be available on the Thomson Reuters Brand Site located at http://brand.thomsonreuters.com/tr/app/asset/asset_search.aspx?libid=1&catid=486.

You will be [required to register](#) in order to access information on this website.

Once you log-in to the site, you should select DOWNLOADS on the navigation bar then go to LOGO ARTWORK then click on FLAGSHIP LOGOS in the left side bar to view and download the logo files and usage guide.

If you have questions about display and usage of the logos, please contact [Tim Mickelborough](#) for assistance.

Will the Lipper Leaders logos change as well?

The Lipper Leaders logos will not be updated at this time. We anticipate the Lipper Leaders ratings logos will change in the next few months when the new Lipper single fund rating is launched. Lipper will introduce a single fund rating designed specifically for investors and advisors. The new rating will be a simplified companion to the more sophisticated Lipper Leaders Fund Ratings which we will continue to offer to our institutional clients. Once this has been finalized, we will likely redesign the Lipper Leaders logos and introduce new logos for the Lipper single fund rating.

What does this mean to our clients and our media partners?

Our clients and media partners are required to update their product interfaces, advertising, sales materials, websites and other communication vehicles featuring the Lipper logo with the new flagship logo by November 10, 2011. This gives our clients and media partners just over 90 days to update the Lipper logo from the time of the initial external announcement on August 9th. Media partners are to use the new Lipper flagship logo in media attributions beginning immediately.

How long do we have to update the new Lipper logo in internal products, sales materials and employee communications?

All internal product interfaces, user documentation, product support documentation, billing and contracts featuring the Lipper logo should be updated to the flagship logo by October 4, 2011. Exceptions will be made for logo updates to be included as part of a product release cycle as long as the release is scheduled prior to December 31, 2011.

Websites featuring the Lipper logo should be updated by September 20, 2011.

All internal communications materials, sales presentations and sales proposals should be using the new flagship logo starting immediately.

Where can I download new Word and Powerpoint templates?

[Document Templates](#) and [Powerpoint Templates](#) will be made available on the Brand Site on The Link. New templates will be available for download on August 9th.



When will updated Lipper sales materials be available (e.g. sales presentations, product sheets, brochures, etc)?

The marketing team is working to update our marketing collateral, events materials and signage, and product and sales websites with the new branding. Updated materials will begin to be released on August 9th 2011 and will continue to be released throughout the remainder of the year. You are welcome to continue using existing materials until updated versions are available. All updated materials will be posted to Customer Connect on the Lipper page as soon as they are approved. Please check this page periodically for updates.

Note: If you are not currently registered on Customer Connect, you will need to create a user name and password to access the Lipper information as well as other valuable sales support information.

http://www.customerconnect.info/index.php?option=com_content&view=article&id=6089:lipper&catid=357:wealthgmt&Itemid=343

How will this benefit our investment management clients?

Thomson Reuters is a highly respected brand amongst investment management professionals. However Lipper has historically lacked brand recognition amongst our client's customers who are mainly wealth managers, independent advisors and investors. The Lipper brand needs to be recognizable to advisors and investors in order for investment management firms to effectively use Lipper data and ratings information in advertising, sales materials and performance reporting targeted to these customer segments. The flagship brand provides an opportunity to promote Lipper and build brand recognition amongst advisors and investors which in turn enhances the value of the brand to our investment management clients.

Starting this fall, clients will begin to see Lipper data and ratings more prominently branded on media partner publications and websites, including The Wall Street Journal, Barron's, The New York Times, and The Financial Times. Lipper is also working closely with Reuters.com to add more commentary and analysis to the Funds Center to provide advisors and investors with useful investing insight. And finally, more Lipper data and tools are being integrated into our desktop and online solutions which are used by brokers, independent advisors and wealth managers.

Why and how are we extending the Lipper brand into the Wealth Management segment?

Today the Thomson Reuters Wealth Management business is actively repositioning itself in the marketplace as an end-to-end provider of solutions designed for wealth managers. Many advisors perceive Thomson Reuters as only a market data provider so we are working to change that perception. One of the ways we are achieving this goal is by promoting our specialized content and news which is delivered via our desktop and online solutions. Lipper information and tools featured within ThomsonONE, Eikon and Knowledge Direct will be a key differentiator in our content and news proposition.

During the next several months, Lipper will focus on developing analysis and ratings which are meaningful and accessible to both advisors and investors. We will start by introducing a new Lipper single fund rating which will provide advisors and investors with a simple snapshot of a fund's performance. This rating will be a companion to the more sophisticated Lipper Leaders ratings which we will continue to offer to our institutional clients. Lipper is also working with Reuters.com to develop editorial content and tools which will provide advisors and investors with insight to help them make investment decisions. Lipper analysis and ratings will be more widely



available on our desktops, online solutions, Reuters.com, and via media partner publications and websites.

What happens if my clients show some resistance?

Explain that updating the Lipper logo will help them benefit from the increased recognition the brand will receive as a result of planned promotional programs aimed at advisors and investors.

Who can I contact if I have additional questions or require additional support?

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