

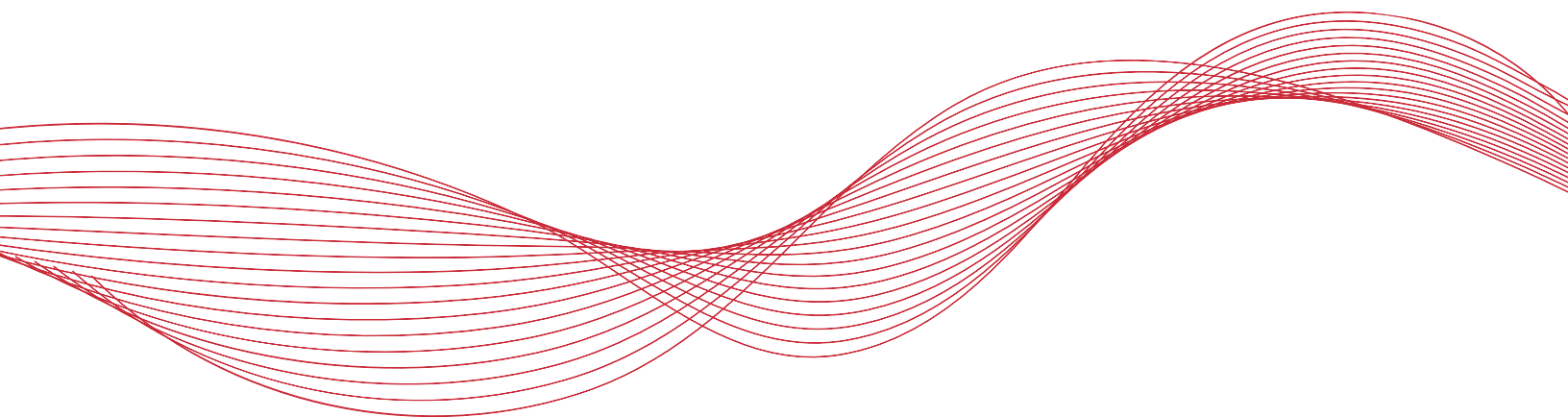
*Li Costi*

# Helping Investment Firms Thrive

WITH GUI COSTIN

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**Fastlane Founders and Legacy Podcast**



# Helping Investment Firms Thrive

In this engaging episode of *Fastlane Founders and Legacy*, Gui Costin, founder and CEO of Dakota, shares how personal branding, strategic communication, and modern content practices are transforming the way investment firms connect with clients. Host Jason Barnard guides the conversation through Gui's personal journey, Dakota's evolution, and the tangible strategies any business can apply to build trust and drive long-term growth.

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Gui begins by acknowledging that while his official name is William, he's always gone by "Gui," emphasizing the importance of brand consistency — even down to the name you use. This segues into a deeper discussion about personal branding, particularly in the investment space, where trust is critical. Gui explains that although he wasn't always comfortable being the public face of his firm, embracing video and content creation helped build credibility and allowed clients to connect with him on a human level. He notes that investors are ultimately buying into people, not just companies, making a clear, authentic personal brand essential.

**Jason and Gui explore five key strategies that investment firms — and any trust-based business — can use to thrive:**

- 1. Video Communication:** Gui stresses that high-quality video, such as recorded quarterly updates or firm overviews, is the most impactful and underutilized tool. Dakota even built its own ESPN-style studio in Philadelphia, encouraging partners to film professional-grade content that fosters trust and personal connection.
- 2. Consistent, Value-Driven Education:** Gui encourages firms to drip valuable insights — like investment decisions or relevant news — through simple, one-line emails. The goal isn't to sell but to educate consistently, helping prospective clients better understand the firm's strategy and build familiarity over time.
- 3. Responsiveness and Relationship Building:** According to Gui, every interaction before a client officially signs on is an audition. Responsiveness, clarity, and professionalism throughout the sales journey communicate what it will be like to work together in the long run.
- 4. Make It Easy to Do Business:** Gui advises firms to create narrative documents that answer frequently asked questions and explain their process clearly. This "do their job for them" mindset helps potential clients write internal memos or investment recommendations with ease, reinforcing confidence in the firm.
- 5. Prepare and Simplify the Story:** Preparation is critical. Leaders must ensure their story is simple, specific, and repeatable so that anyone in a client's organization can clearly explain what the firm does and how it does it. This increases the chances of successful internal advocacy and decision-making.

On the topic of technology, Gui acknowledges AI's usefulness in summarizing data but emphasizes the irreplaceable value of human-crafted, bespoke communication. He closes by underscoring the art of client retention — which, in his view, boils down to one word: communication. Frequent, thoughtful updates that show awareness of clients' needs are key to maintaining trust and long-term relationships.

This episode offers a tactical, human-centered blueprint for founders and leaders looking to grow their business, brand, and legacy through clarity, empathy, and strategic communication.

