



Adam Bolter Quoted in *The Daily Upside* on SEC's FAQs Related to Marketing by Investment Advisers

March 25, 2025

Adam Bolter, counsel in Katten's Financial Markets and Funds Department, was quoted in a recent article by *The Daily Upside* discussing the Security and Exchange Commission's (SEC) updated set of FAQs addressing issues in the rules on marketing by investment advisers, and in particular, issues faced by private funds.

Adam commented on the relief the new guidance brings advisors, suggesting the FAQs address "a known bottleneck" in the marketing process for private funds and "should help advisors present information that they see as useful to investors."

He elaborated on the potential for further developments in the regulatory landscape, noting, "Under the past administration, it was a lot more challenging for staff to put out guidance. We just didn't see a lot of it." Adam's insights highlight the evolving regulatory environment and its implications for fund advisers in presenting performance metrics to investors.

"[SEC Eases Rules on Marketing](#)," *The Daily Upside*, March 25, 2025

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