Investment Consultants Grow in Size and Influence

2023 Greenwich Leaders: U.S. Investment Consulting

April 23, 2024

Executive Summary:

Investment consultants have always been a critical part of the U.S. institutional asset management business, but new data from Coalition Greenwich shows that the market's top consultants are becoming more influential than ever.

Methodology:

Between February and November 2023, Coalition Greenwich conducted interviews with 708 individuals from 575 of the largest tax-exempt funds in the United States. These U.S.-based institutional investors are corporate, public, union, and endowment and foundation funds with either pension or investment pool assets greater than $150 million. Study participants were asked to provide quantitative and qualitative evaluations of their asset management and investment consulting providers, including qualitative assessments of those firms soliciting their business and detailed information on important market trends.

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www.greenwich.com | ContactUs@greenwich.com

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greenwich.com ContactUs@greenwich.com Ph +1203.625.5038