2024 Investor Perspectives on Investment Consultants

2024 Canadian and U.S. Institutional Investors Studies

January 6, 2025

Executive Summary:

In 2024, Coalition Greenwich undertook a study with institutional investors to assess the latest trends in Investment Consultant relationships. We gathered in-depth feedback from institutional investors on their views of the current consultant relationships they have, including major reasons for hiring and not hiring consultants, attributes they look for, searching methodologies for hiring, effectiveness measurement techniques, frequency of review of investment consultants and triggers leading to review.

Methodology:

Coalition Greenwich interviewed 137 institutional investors in North America between February and July 2024.

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