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Best Practices in Formal Meetings with Investment Consultants

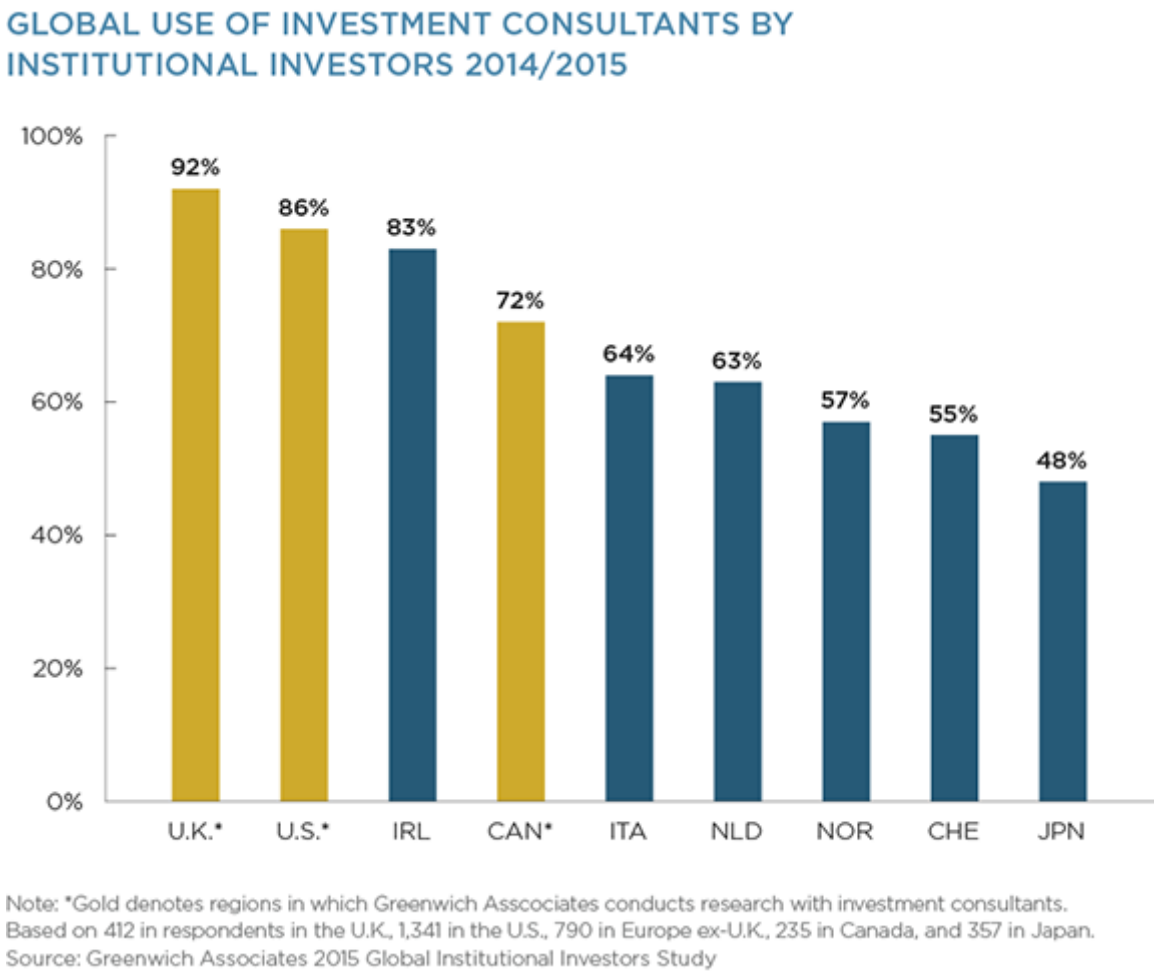
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Executive Summary:

A formal review meeting with an investment consultant can be a make-or-break moment for an asset manager. A chance to meet a consultant face-to-face for a formal meeting represents the culmination of months or even years of relationship building and selling the firm's investment philosophy, process and people.

These are not opportunities to be squandered.

Greenwich Associates research shows that 86% and 92% of institutional investor relationships are intermediated by investment consultants in the United States and United Kingdom. As such, consultants act as global gatekeepers to thousands of institutional client relationships and trillions of dollars in assets. In servicing those clients, consultants review thousands of asset management firms using internal databases. Of these, only a fraction receive an invitation to visit the consultant's office for a meeting. Only then do the chances of actually winning business start to tilt in the manager's favor.



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