Investment Consulting Trends | 2016 Research with United States Institutional Investors

Key Trends in the U.S. Institutional Investment Consulting Business

April 27, 2017

Executive Summary:

This report provides detailed information on investment consultant usage globally. Review the market position of leading firms, including those consultants most frequently considered for a new assignment, in addition to average fees paid by type of investor.

Methodology:

Greenwich Associates' 45th annual research with U.S. Institutional Investors is based on in-depth interviews conducted primarily through in-person interviews, and supplemented by telephone interviews and online surveys, between July and October of 2016.

Respondents include 1,216 individuals from 1,052 of the largest tax-exempt funds in the United States. These U.S.-based institutional investors are corporate and union funds, public funds, and endowment and foundation funds, with either pension or investment pool assets greater than $150 million.

Senior fund professionals were asked to provide quantitative and qualitative evaluations of their investment managers' investment and servicing capabilities and also of the managers soliciting their business. Fund professionals were also asked detailed information on important market trends.

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