Investment Consulting Trends | 2017 Research with United States Institutional Investors

Key Findings from the 2017 U.S. Institutional Investors Research

May 3, 2018

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' 46th 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 2017.

Respondents include 1,059 individuals from 884 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 consultants. Fund professionals were also asked detailed information on important market trends.

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