

# Highland Consulting – Research Team Overview

## Firm Background

- 100% employee owned
- E&F and corporate (ERISA) focus
- Headquartered in Cleveland Ohio
- Primarily US and Canadian client base

## Research Team

- Career position; Reward for independent thought
- Global research coverage and travel
- Asset class specific analyst responsibility with regular rotation to encourage diversity of perspective
- ~70% of research team has achieved the CFA and/or CAIA designation

## Research Highlights

- Proprietary research database
- Fully customized searches
- Preference for capacity constrained strategies
- Detailed investment and operational due diligence process
- Weekly research team meetings
- ESG aware

**10+**

Research Analyst -  
Average years'  
experience

**0**

Proprietary  
Strategies

**0**

Clients with the  
same portfolio

**33%**

of all Highland  
associates focused  
on research