



ASSOCIATION OF INVESTMENT
MANAGEMENT SALES EXECUTIVES



fid·u·cient

[fuh-du-shent] *noun*

a trusted fiduciary
committed to
helping clients prosper.



Business Lines

Defined Contribution	Endowments
Defined Benefit	Foundations
Financial Institutions	Private Clients

171 Associates

40% Investment Consultants
20% Research Professionals
40% Operations, Client Service
& Compliance

Assets Under Advisement

\$250+ billion

Associate Ownership

30 Partners
>15% of firm Associates
have ownership

Research



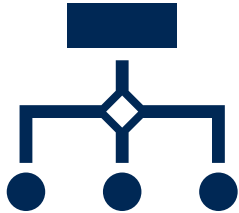
Our Experienced, Deep Research Team



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How We Serve Clients



Centralized Research

- One team across all client types
- Integrated into client allocation decisions



One Asset Allocation Philosophy

- Frontier Engineer[®] Framework
- Commonality among clients, but not a model portfolio



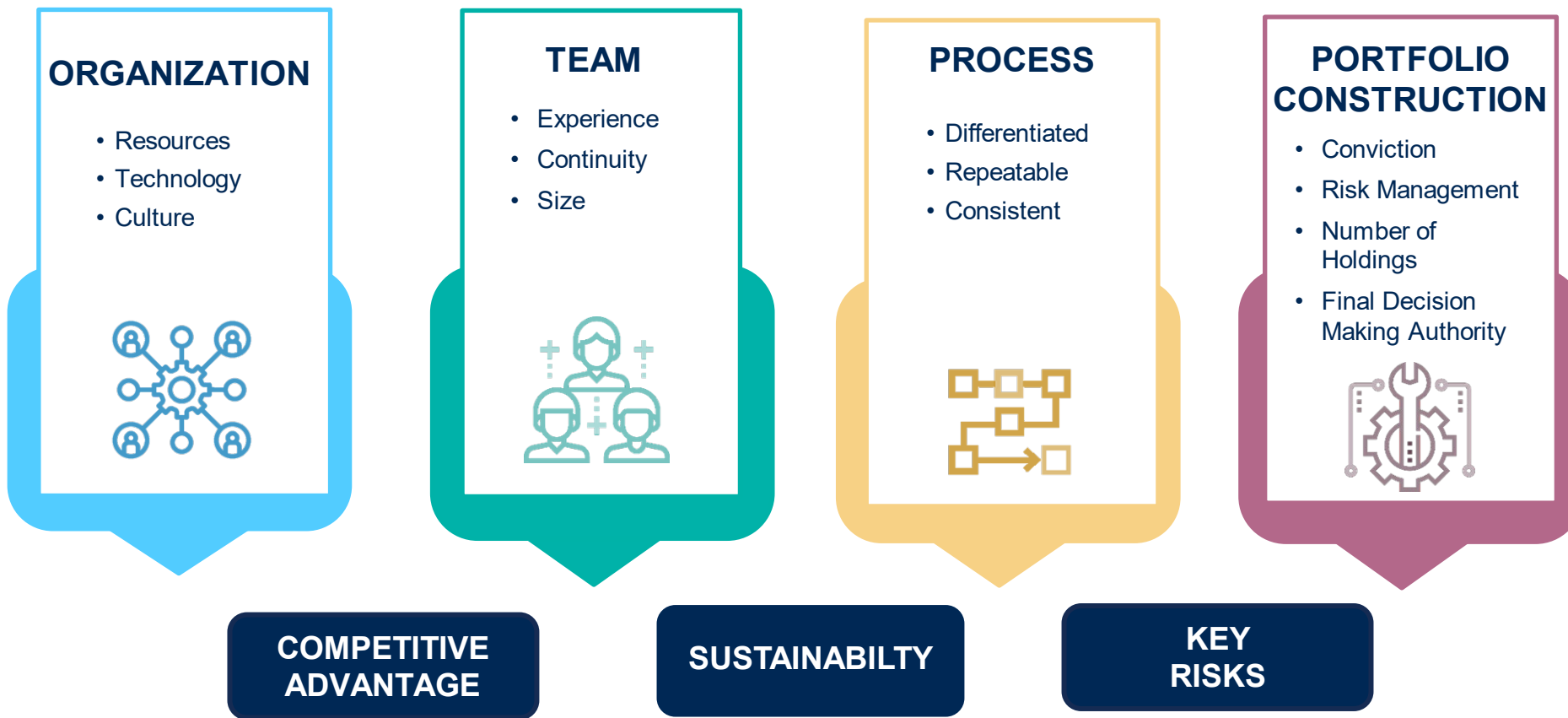
Recommended List

- Single list of top ideas used to allocate new capital
- Not a rating system





The Four Pillars



Where are we?

Locations

Majority of Research Team Located in [Chicago, IL](#) & [Windsor, CT](#), however we also have Research team members in South Carolina, Utah and Washington DC.

In Office Meetings?

Not yet. Both Chicago, IL & Windsor, CT hope to open in Q1, 2022. We hope to return to in office meetings by late [Spring 2022](#).

New Paradigm w/ Travel

Gone are the days of in person updates but expect onsite due diligence to [resume in 2022](#).



1

ESG & DEI Here to Stay

Collectively we need to do a better job defining, reporting, and communicating this information. Consider the IIDC framework if you have not already.

2

What to do with the Dragon in the Room?

Growing conversations around China spurred by both recent volatility and China's position in indexes and the global economy.

3

Digital Assets

As acceptance grows first movers seem to have material advantage.

4

Consider Structure

Active ETFs are likely to be a growing portion of wallet share in the future.

5

Litigious Defined Contribution Environment

Fees, vehicles, share class access, etc. continue to be a focus area for this more litigious client segment.

Disclosure

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