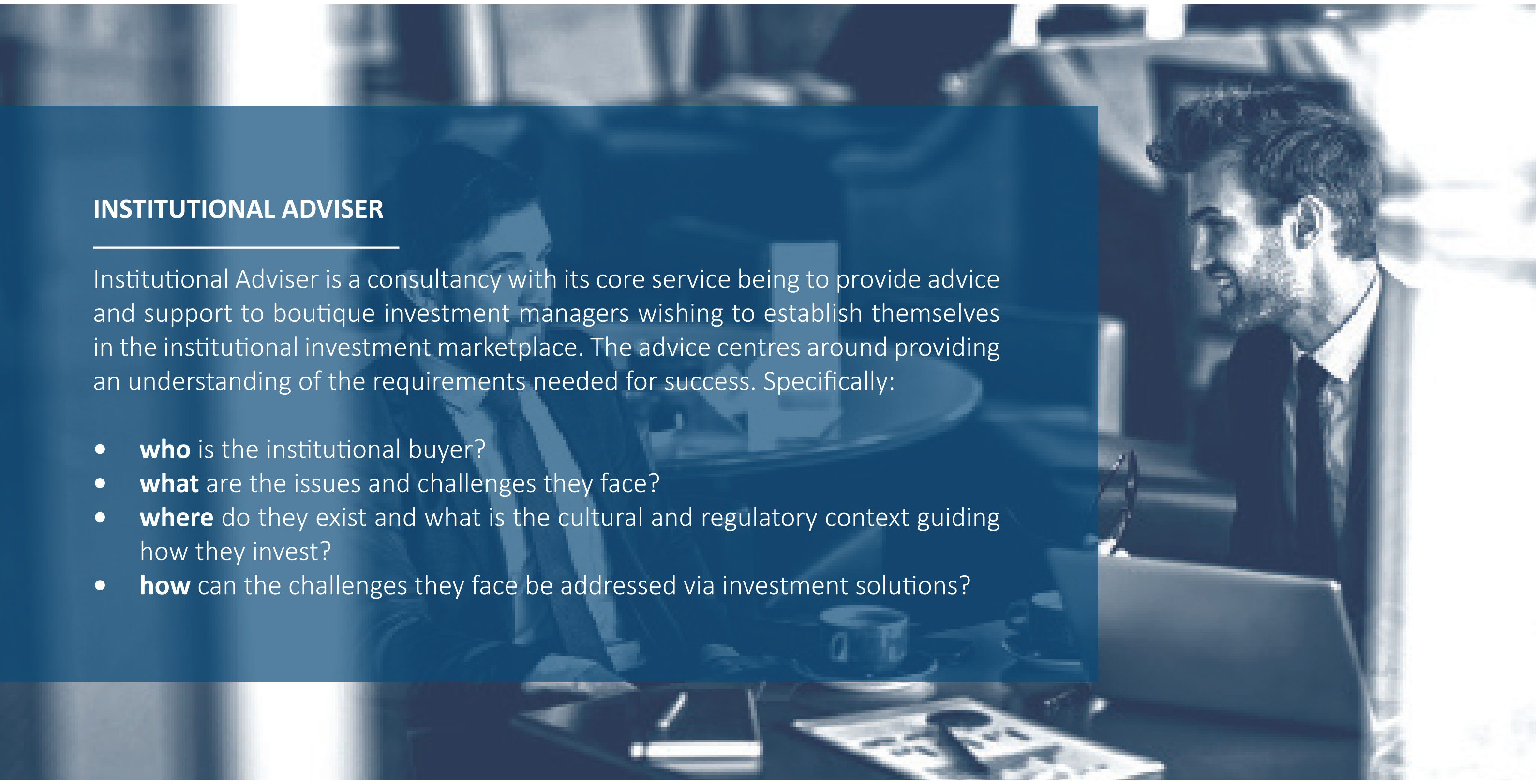
Chartered Developments



INSTITUTIONAL ADVISER

Institutional Adviser is a consultancy with its core service being to provide advice and support to boutique investment managers wishing to establish themselves in the institutional investment marketplace. The advice centres around providing an understanding of the requirements needed for success. Specifically:

- **who** is the institutional buyer?
- **what** are the issues and challenges they face?
- **where** do they exist and what is the cultural and regulatory context guiding how they invest?
- **how** can the challenges they face be addressed via investment solutions?

INSTITUTIONAL ADVISER PROVIDES THREE CORE SERVICE OFFERINGS: COMPASS, STEPPING STONES AND BRIDGE.

For clients who wish to familiarise themselves with the institutional marketplace or specific segments within it. ***Compass*** is an advisory service to assist on the key elements of the landscape:

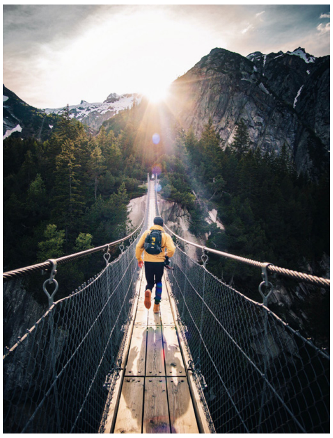
- where are the significant pools of capital and under whose ownership and control?
- What are the prevailing trends and to what extent do these give rise to opportunities?
- What are the barriers to entry and how are they best overcome?
- What approach to distribution can facilitate success?

Clients further along their investigation into a new market entry, *stepping stones* is a way to crystallise some of the high level thinking into a strategy for implementation. Mapping the market environment to specifics of the investment offering, the output would be journey plan of what is necessary to approach institutional clients, resourcing required, necessary marketing collateral, pricing, sales approach and operational infrastructure.

www.chartdev.co.uk 01392 247200 info@chartdev.co.uk

OUR BUSINESS IS
NEW BUSINESS

Chartered Developments



Taking the strategy from paper to implementation is our ***bridge*** service. This service offers the marketing and distribution of the investment proposition to the end prospect/ client and their advisers:

- Sourcing of new business contacts
- Brand introduction to contacts
- Investigation into the needs of the asset owner in relation to the investment strategy under consideration
- Initial meeting to discuss prospect's parameters and appetite for the investment strategy
- Where appropriate, engagement with the client consultant to highlight interest.
- Follow up meetings to deal close and finals presentations.
- Post win, client servicing.
- At each stage, call reports and follow up actions provided in a monthly report.

Marketing of investment strategy to researchers of global and/or local consultants

- Brand/investment strategy introduction to research consultants
- Investigation into the viability of the investment strategy and positioning in respect of the consultancy firm's current/near term focus
- Mapping of appetite across the targeted investment consultants.
- Formulation of plan to achieve 'ratings' of strategy.
- Execution of agreed plan.

PETER BRACKETT IS THE FOUNDER AND MANAGING DIRECTOR OF INSTITUTIONAL ADVISER.

Peter has over 27 years of experience in the financial industry, most recently as Managing Director and UK Head of Consultant Relations for State Street Global Advisors. Before SSGA Peter was Global Head of Consultant Relations at Amundi and previously held positions at American Century and Morgan Stanley Investment Management. Earlier in his career Peter was a senior investment consultant at Watson Wyatt and Aon, advising pension and charity clients in the creation and implementation of their investment strategy. He has also worked as an adviser to financial institutions whilst at InterSec Research and Euromoney Publications.

WHAT COULD YOU ACHIEVE WITH US ON YOUR TEAM?

Call us now on 01392 247200 or email info@chartdev.co.uk to learn more.