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Enhancing Investment Consultant Relationships in Asset Management

July 18, 2023

Executive Summary:

Has the practice of engaging investment consultants changed in recent years or do the same tried-and-tested principles still apply? Are there different strategies and tactics that managers should now be employing to maximize relationships with investment consultants?

In 2017, we published an Investment Consultant Playbook, outlining the key steps to achieving a winning relationship with investment consultants. In this paper, we are revisiting the topic and considering which engagement principles remain the same and what has changed in the intervening six years. The result is an updated, "new and improved" approach to successfully managing relationships with investment consultants.

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