Frequently Asked Questions by Institutional Investors

Who is Coalition Greenwich?

We are a leading global provider of data, analytics and insights to the financial services industry. We conduct approximately 60,000+ interviews annually with key buyers of financial services, including 3,000+ asset owners that share the insights most critical to their institution.

What is The Greenwich Exchange and why should I engage in this research initiative?

The Greenwich Exchange provides institutional investors with robust, trended and actionable data to inform their decision-making—all in exchange for providing feedback in a structured business conversation.

Research participants receive regional and global industry insights, as well as peers' perceptions of asset managers and investment consultants. This interactive resource helps institutions optimize relationships with providers and achieve their investment goals.

Institutional investors like you participate to:

- **Learn about industry best practices** by comparing their fund's profile against those of peers
- **Improve the investor experience** by helping providers acquire objective feedback on the services they deliver
- **Identify products most in demand** segmented by geography, investor type and size of fund
- **Benchmark compensation** (including salary and bonus) against peers by job function and tenure

Can I see sample reports and research before agreeing to participate in the study?

Yes. You may request samples of our reports/research in advance.

Do I need to pay for the investment management research?

No. The research is provided in exchange for speaking with an interviewer. Participants will receive the study results and access to hundreds of thought leadership papers available on greenwich.com.

How long does it take to complete the interview?

Senior leaders typically reserve 30–60 minutes to speak with an interviewer, but the discussion may be shorter depending on answers to questions.

How do I confirm participation in this research engagement?

You will be contacted by an interviewer via e-mail or telephone to schedule an appointment. Or, you may reserve time in advance by emailing ContactUs@greenwich.com.

When does the study end?

The study will be conducted through the end of Q3.

What if I cannot participate until after the deadline?

Arrangements can be made, if necessary, to include your feedback before the close of the study. Contact us to learn more.

What are the topics to be covered in the discussion?

We explore all aspects of the management of your fund, e.g., asset allocation, products used, fees paid, and expectations to hire. You will also be asked to evaluate the investment and service quality you receive from your asset managers, investment consultants and fully delegated/outsourced relationship providers (where applicable).

How will the information that I provide be used?

We present key study findings to our clients to help them improve the quality of service they provide to institutional investors and to stay abreast of trends in the institutional marketplace.

Will service providers know that I participated in the study and see my answers?

You can choose the level of disclosure attributed to you and your firm.

What if I have a policy against interviews?

We will report your answers in confidence at your request. Your responses can be undisclosed and not attributed to you or your firm. Please contact us to learn more.

How will the interview be conducted?

The executive interviewer will conduct the interview at a time of your convenience either in person or over the telephone.

If I have questions, how do I connect with someone at Coalition Greenwich?

See contact information below.

See all the benefits you can access as a study participant.

join the conversation

Learn more about *Greenwich Exchange* benefits
EMAIL ContactUs@greenwich.com
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