

How Advisory Firms Gain Leverage Via Outsourcing



Why consider outsourcing?

Research studies conclude that one-on-one interactions with clients are the primary driver of an advisory firm's growth. Growth declines when administrative work pulls advisors away from one-on-one client interactions. Profitability also declines when fixed administrative and technology expenses cut into operating margins.

Outsourcing technology and back office operations enable s your firm to:

- Reduce the need to make costly fixed infrastructure expenditures to support growth
- Support an asset-based variable-cost model, to keep expenses in-line with fee revenue
- Gain economies-of-scale via a partner whose core competence is technology and operations
- Leverage multi-custodian connectivity for reporting and portfolio accounting
- Build a long-term partnership to continuously maintain leading edge capabilities
- Mitigate growth in administrative staff in order to focus on growing advisor team
- Avoid the cost and management time devoted to frequent technology upgrades
- Facilitate standard processes to strengthen internal controls and compliance management
- Concentrate advisor time on value-added services to retain and grow clients

Use outsourced services to strengthen your investment product offerings

- Add open architecture products without increasing investment management overhead
- Complement your in-house research capabilities via a team with global expertise
- Incorporate model-based mutual-fund, SMA, and UMA programs
- Acquire administrative support for your proprietary investment offerings

How to choose a provider of outsourcing services

Carefully examine these characteristics in order to select the right provider for your firm:

- Experience and financial stability of the firm
- Provider's reputation for quality
- Ability to form and maintain a strong strategic partnership with your firm
- Strong track record of delivering leading edge investment products and services
- A consultative approach backed by a very experienced professional staff

Why consider FundQuest?

Since 1993, FundQuest has supported advisors with a full set of managed account services:

- Advanced technology-for client profiling, portfolio diagnostics, and proposal generation
- Connectivity and partnerships with all of the leading custodians
- Economies-of-scale from supporting 130 advisory firms with over 100,000 client accounts
- High-quality, carefully monitored, middle and back office operational support services
- On-demand fact-sheets for mutual fund, ETF, and model portfolio research
- Access to a global 48-member research team and dynamic disciplined selection processes
- A wide universe of FundQuest managed models and advisor discretionary programs
- Cross-custodian quarterly performance reporting with flexible householding options
- Account monitoring and rebalancing for FundQuest managed models
- Experienced national consulting team for training and proposal support services
- Part of one of the world's largest and most stable financial services firms, BNP Paribas

Call **888.253.9169**, visit www.fundquest.com/usa, email internalsales@fundquest.com

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A Strategic Outsourcing Partner to Help Control Your Expenses and Accelerate Your Growth

Experience and Innovation: Founded in 1993, FundQuest is the best outsourcing partner to help advisory firms grow their business and control expenses via the most innovative advisor productivity technology, back-office services, and open architecture investment programs

Best Services and Support: FundQuest is the most flexible service provider with the best overall sales and back office support services for both management and advisors

The Choice of Leaders: More than 130 institutions including RIAs, insurance companies, independent broker dealers, banks, and trust and wealth management firms partner with FundQuest

Investment Management Expertise: FundQuest's investment management team has more than 48 analysts in the combined US and European operations who perform in-depth quantitative and qualitative investment due-diligence

Proven In the Field: Institutional partners make FundQuest's web based platforms available to a national network of 49,000 financial advisors

Operational Scale: FundQuest has \$64 billion under management and administration in its combined US and European operations

Financial Strength: FundQuest is part of BNP Paribas, one of the world's largest and most stable financial services firms

Services are offered in the U.S. through FundQuest Incorporated, a Registered Investment Advisor with offices at One Winthrop Square, Boston, MA 02110.

For more information please:
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