



*In addition to our core investment consulting services Peirce Park Group offers a co-fiduciary investment consultant program to institutional clients. PPG has developed a transparent solution allowing us to more actively assist clients in the management of their funds. Consulting Plus includes our traditional, core investment consulting services plus the implementation of your investment policy.*

## CORE CONSULTING

### ADVICE

#### Core Services Include:

- » Investment Policy Statement Design
- » Asset Allocation
- » Manager Search Due Diligence
- » Performance Monitoring
- » Education
- » Strategic Plan

## CONSULTING PLUS

### IMPLEMENTATION

#### Includes All Core Services Plus Implementation of Investment Policy

- » Portfolio Construction
- » Manager Selection & Termination
- » Allocation Among Managers
- » Rebalancing

### PPG ADVANTAGE

- » No Conflicts of Interest = Unbiased Advice
- » Full Transparency = Security and Knowledge
- » Open Architecture = Flexibility to Customize
- » Full Access to World Class Investment Firms and Strategies

## PHILOSOPHY & PROCESS

Our institutional clients are strategic and long-term in terms of their investment horizon – therefore short-term, tactical decisions are not part of our process. Each client has unique needs and preferences – with this in mind we design a custom solution that is targeted to meet such requirements. Importantly, this service is provided without any conflicts and is always in the clients best interest.

Peirce Park Group has an investment committee comprised of the firm's senior professionals and research analysts. Extensive

capital market research and manager due diligence is carried out by our experienced team. Weekly reviews of Consulting Plus client portfolios are held to monitor the performance of the underlying asset managers. Formal monthly meetings take place to evaluate macroeconomic themes, asset class exposures, markets, new strategies, performance and compliance with each client's investment policy. Any changes to rebalancing of the portfolio can be made in a timely and efficient manner. A broader range of strategies provides diversification benefits for our clients.