ADVANCED DUE DILIGENCE AND MANAGER SELECTION WORKSHOP

Minneapolis, MN
November 7-8, 2017
All organizations are messy.

Not that you’d know that by reading most due diligence reports, which focus mostly on the documentation and recitation of a manager’s story.

What you need are strategies and tactics to crack that narrative and to discover the true characteristics of a manager.

Differential design of the due diligence process leads to better understanding of the factors that will shape a manager’s prospects for the future.

This workshop is structured to provide new ways of investigating and analyzing investment management organizations.
Workshop leader

Tom Brakke, CFA provides advice to the leaders of investment organizations, including asset managers, institutional asset owners, and wealth management firms. He has evaluated many investment organizations himself and studied the due diligence and manager selection practices throughout the investment world. Tom has spoken to numerous CFA societies, industry conferences, and organizations of various kinds.

WHO SHOULD ATTEND

The workshop is centered on core principles that can be applied regardless of the kind of organization for which you work. Emphasis will be placed upon how you adapt those principles for use in different situations.

Institutional asset owners, family offices, investment advisory firms, fund-of-funds managers, consultants, and those who choose subadvisors for products or invest in asset management firms will gain new insights into the allocation process.

HOW TO CHOOSE

To select an investment manager, you must start with a framework that fits your situation, resources, and beliefs. Then you need to identify the differential attributes of the managers being considered before making a decision.

Behavioral biases and organizational hurdles can lead to poor choices. And performance assessments color all parts of the decision making process. If you don’t establish the foundation for the decision, you are likely to default to an easy course of action.

Where are the traps that exist? How can you avoid them?

LEARNING

The workshop will be conducted in a classroom setting. There will be extensive use of case studies and examples, plus interactive exercises designed to foster the direct learning of the participants.

The goal of the workshop is to surface the ideas and skills of the group while exploring the most important areas of due diligence and manager selection, identifying not just best practices but next practices.

Via the online workgroup, concepts can be explored in detail in advance and after the workshop itself, deepening and extending the discovery process.

Finally, the one-on-one consultation will aid in adapting new ideas to the organizational structure that you work within.
For further information, contact Tom Brakke at tom@tjbllc.com.
To register for the workshop, complete this form.