



THE MONEY MANAGEMENT INSTITUTE

Uniting

Information

Outreach



Hybrid Approach -
Mutual Funds and SMAs

Hybrid Approach

- ◆ Background
- ◆ Business Overview
- ◆ Firm Structure
- ◆ Distribution Strategy
- ◆ Back-Office Infrastructure

Distribution

- ◆ Sponsor Firm Coverage
- ◆ National Accounts
- ◆ Regional Consultant/SMA Specialist

Product Development

- ◆ Traditional
- ◆ Non-Traditional
- ◆ Alternatives
- ◆ Overlays
- ◆ Institutional Share Class Portfolios

Back Office Approach

- ◆ Structure
- ◆ Efficiencies
- ◆ Quality Control
- ◆ Decision to Build or Out-Source?