



ManagerQuest® - Database Updating Service for Money Managers

Today, there are more registered investment managers than there are stocks on the NYSE. Investment consulting firms help investors decide which of those managers, across the country, are best suited for specific investment objectives. Good performance suits everybody, but things like geography, philosophy, personalities and process help investors and investment managers make it through those times when performance isn't so...suitable.

In order to search for managers, consultants compile databases of information gathered over time from managers via monthly, quarterly and annual questionnaires. There are also several organizations that compile generic manager databases for resale and several online sources that directly connect investors to qualified money managers. Today, we know of hundreds of investment consulting firms and over 40 databases that these firms use to help sort out which managers are right for which investors.

Each database, publication or other source that is compiled creates more work for money managers who wish to promote their services. Completing these questionnaires and mandate-specific Requests for Proposals (RFPs) is an essential marketing function, often requiring at least one full-time associate. If you don't have the time or resources to manage your distribution of information to investment consultants, third party databases, industry publications and other interested parties, we can help.

How ManagerQuest® Works

After a thorough review of your performance history and marketing materials, we recommend specific databases, consultants and/or research firms that we believe can improve your visibility in the marketplace and help you increase your assets under management. Upon your approval, we register your firm with each database and complete all required questionnaires on your behalf. You'll work with an account manager who is responsible for managing the flow of all your data—from the time you provide it to publication in each database. Your account manager will also be your go-to person for any questions you may have.

To expedite the data collection process, we can extract account-level data from your portfolio accounting system (e.g., Advent Axys®, etc.) and calculate the required AUM, performance and fundamental portfolio statistics for each data source. We continuously update your firm and product information (qualitative and quantitative) throughout the year upon receipt of new data from your team.

ManagerQuest® provides you with real time updates on the progress of our data management activity on your behalf. This allows your marketing services team the ability to monitor and report the

status of the database population effort to management, sales, portfolio managers and product managers. ManagerQuest is used to collect, organize, store and share your data files and completed database profiles. Your secure and private Data Library and other information are available to you and your team at all times, from anywhere in the world.

Key Benefits

- Reach investors and consultants actively searching for managers.
- Increase assets under management.
- Requests for information are completed faster while eliminating work and redundancy.
- Better communications, consistent, accurate and timely information.
- Better use of your employee time and skills: less repetitive tasks, increased morale.

Why A.S.A.P. Advisor Services, Inc.?

- **Experience.** Team of experienced asset management marketing and database specialists with broad product knowledge and expertise across the full range of asset classes.
- **Professional network.** Strong relationships with investment consultants, database managers and other third party intermediaries.
- **Innovative and efficient.** Developer of information management and marketing automation programs and tools.
- **Commitment to quality.** Dedicated to exceeding our clients' expectations. We set and maintain standards for ourselves that exceed those of our clients and the industry.
- **Completely independent.** We do not have any conflicting relationships that would compromise our objective delivery of truthful and beneficial services to you.

About A.S.A.P. Advisor Services, Inc.

Founded in 1998, our mission is to provide expert marketing support and data management services for the investment management community. Our flagship service, ManagerQuest®, streamlines the costly, time-consuming process of providing firm and product information to investment management consultants and third party databases. The timely provision of such information is an essential task to secure new assets and to service existing clients. Other services include RFP preparation, comprehensive data audits and competitive analysis.

We welcome the opportunity to learn about your specific marketing objectives and to tell you more about how we can put our knowledge and resources to work for you.

A.S.A.P. Advisor Services, Inc.
41 East 11th Street, 11th Floor
New York, NY 10003

Phone: (866) 922-8733
Email: info@asapas.com
Website: www.asapas.com