

Investment Manager Selection

We employ a vigilant manager selection process—one that dissects quantitative results and underscores qualitative factors. Our due diligence process emphasizes face-to-face meetings and on-site visits to gain critical insight that cannot be cultivated from a database. Once selected, we look to build long-term relationships with our managers, while continuing to critically evaluate and monitor their performance and organizational changes.

The Ashbridge team searches the globe for investment managers who possess our preferred set of characteristics. To highlight a few:

Organizationally, we favor:

- ▶ Independent ownership
- ▶ Strong leadership
- ▶ Significant investment by key personnel
- ▶ Clear succession plan
- ▶ Measured growth
- ▶ Exceptional culture

Strategically, we seek:

- ▶ Focused, niche managers
- ▶ Sound, differentiated strategies
- ▶ Independence of thought
- ▶ Strongly integrated processes
- ▶ Constructive team dynamics
- ▶ Monitored risk controls
- ▶ Compelling performance

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