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All participants will receive a complimentary summary of the survey analysis.

The Sponsor Separate Account Consultant Programs Survey targets third-party manager programs. Cerulli Associates defines these programs as those which offer separate account asset management from multiple investment firms and are typically sponsored by a broker/dealer. This survey contributes to the much anticipated quarterly rankings of Managed Accounts industry firms.

Topics covered by this survey include:

- Number of Programs
- Program Assets
- Distribution channels
- Asset flows
- Program Economics and Breakdown
- Money Manager Relations

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Target: Managed Accounts Program Sponsors
Frequency: Quarterly

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Data and findings from this survey are used in the following Cerulli Products:

Cerulli Quantitative Update: Managed Accounts
The Cerulli Edge: Managed Accounts Edition

Related Cerulli Surveys:

Rep as Portfolio Manager

Fee Based Brokerage

Mutual Fund Advisory Programs

Proprietary Separate Accounts

Separate Account Consultant Programs

For more information on how to participate in this survey, log on to our Website at www.cerullisurveys.com or contact:

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