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

The Unified Managed Accounts (UMAs) Survey targets managed account program sponsors which have developed platforms supporting UMA capability. Cerulli Associates defines UMAs as product-neutral managed account platforms, which simplifies the delivery of multiple investment products through their integration within a single managed account environment. Programs achieve UMA status when all managed account attributes can be applied across multiple investment products. This survey contributes to the much anticipated quarterly market-sizing of managed accounts industry firms.

Topics covered by this survey include:

- Program assets
- Asset flows
- Breakdown of investment vehicle usage
- Characteristics of program
- Distribution channels
- Program economics

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Target: Asset Managers
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: U.S. Edition

Related Cerulli Surveys:

Managed Accounts

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

Dan Devoe
617-437-1098x107
ddevoe@cerulli.com

Jeff Strange
617-437-1098 x153
jstrange@cerulli.com