



Product Name - Service Provider Business intelligence, or SPI

Product Description – SPI provides key business intelligence and supporting data on key service providers that you use and may consider using in the future.

Product Benefits – SPI helps you meet the parts of the reasonable and customary steps that fiduciaries are expected to take when selecting service providers whose fees are paid by your clients and follow existing “Best Execution” rules, “SRO guidance,” and the SEC’s proposed “Outsourcing Rules” for service companies that qualify as designated activities.

Product Features

1. **Coverage** - We cover Fund Administrators, Auditors, Prime Brokers, Custodians, Marketers, Transfer Agents, ManCos and Compliance firms. The data in the report is based on information we collect, curate and create on 55,000 global investment advisers and the 450,000+ public and private funds they advise.
2. **RFI & RFP Support** – The business intelligence in the reports represents the “voice of the market” which tells you which service providers are being hired and changed by RIAs based on the size, strategy, complexity and domiciliation of the funds they service. These insights answer the question “what factors did you consider when inviting service providers to respond to your RFI/RFP” and can be used to negotiate pricing and legal indemnifications.
3. **Independence** – SPI is independent and replaces subjective decisions with objective, independent decisions.
4. **Risk and Sustainability** – Business intelligence designed to identify business conditions within the service provider that can influence your final decision after you have completed the deeper dive due diligence you likely perform on their people, products, services and technology. For example, how much of the service provider’s existing business fits your exact needs, has the service provider lost clients that fit your needs, does the service provider have debt to fund working capital, how exposed is the service provider to their top 10 clients, and more.

Product Users – CFOs, COOs, and others involved in selecting and monitoring service providers.

Get in touch to learn more about SPI

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