

GLOBAL WEALTH

# The Partner Financial Intermediaries Need to Help Clients Grow Their Wealth



MAKE TOMORROW, TODAY



Serving your clients well means delivering the best investment solutions available at the lowest cost possible to help them grow their wealth. This can be challenging, particularly in times of low growth, market turbulence or regulatory change. There is also an ever-increasing array of financial intermediaries competing with each other and with technology to deliver better solutions for clients. Luckily, Mercer can help.

At Mercer, we partner with financial intermediaries and wealth managers of all types and sizes – from registered investment dealers, aggregators and broker dealers to banks, trusts and family offices – to help them deliver market-leading investment solutions to their clients.

# The Innovations You Need to Outperform the Competition

Mercer has the deep global research and implementation expertise as well as the innovative solutions you need to power your business and stay several steps ahead of the competition. As your partner in growth, Mercer brings the following benefits to your business and your clients:

- **Innovative products and portfolio construction to deliver alpha performance**

Your clients demand performance. As the global leader in innovative products and portfolio construction, Mercer partners with you to deliver that performance so you can attract and grow your client base.

- **Efficient access to alternative investments**

In today's low-growth environment, alternative assets are often the key to capturing alpha. As the world's leading advisor and the manager of more than US\$230 billion in delegated assets and trillions under advice, Mercer has access to world-leading private equity, infrastructure and other alternative investments. As your partner, we ensure your clients can reap the rewards of investing in these high-growth areas.

- **Buying power that keeps your costs competitive**

Differentiating yourself in an increasingly competitive marketplace requires giving your clients access to the right diversified investments while keeping costs low. By partnering with Mercer, you can take advantage of our aggregated buying power to access highly rated managers, create cost-effective institutional-quality portfolios and reduce your operational, administrative and legal costs.

## Full-Spectrum Services to Complement Your Strengths

Whatever the needs of your business – from research and advice to a full range of customized solutions, including outsourcing your investment operations and fund management entirely – Mercer is your ideal partner. We offer any combination of the services you need to best serve your clients and differentiate your business, including:

Putting Mercer research, advice and solutions to work for your business and your clients.



### Research and Analytics to Enhance Returns

MercerInsight® puts sophisticated information on almost 6,000 rated investment managers and 30,000+ strategies at your fingertips. Powered by more than 140 full-time researchers and including insight and analytics on performance, fees and rating history as well as research reports and news items, MercerInsight offers unparalleled global coverage of managers and opportunities to help you mitigate risks and enhance returns.



### Expert Investment Advice

In addition to our leading research, Mercer provides financial intermediaries with the customized investment strategy, asset allocation, portfolio construction and manager selection advice you need to deliver superior investment returns while minimizing costs.



### Innovative Solutions Across Multiple Asset Classes

Our scale and reach give you access to institutional-quality and alternative investment strategies that might be difficult to access on your own. We also provide delegated solutions that can deliver efficient access to a variety of investment classes to meet the needs of your clients and grow your business.

## Contact Mercer to Learn More

To learn more about how Mercer can partner with you to deliver the best investment solutions to your clients, visit <https://www.mercer.com/what-we-do/wealth-and-investments/financial-intermediary-partnerships.html>.



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