

CASE STUDY:

ASSET MANAGEMENT GLOBAL GROWTH EQUITIES



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Chartered Developments is recognised as a market leader in the financial industry.



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The highly successful team, headed up by Rohan Hardeman, can call on years of experience of industry calling.



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For more information on how Chartered Developments could help you please call to speak to Rohan on 01392 247200

CLIENT PROFILE

The client is a US provider who are unknown in the UK. They have a Global Growth Equity fund with FSA approval. The fund is A rated by two major consultants.

THE BRIEF

- To vastly improve the client's understanding of the UK DB market and improve the market's knowledge of the brand and product awareness of the client.
- To gain introductory meetings with the Chairman Of Trustees and/or Head of Investment Sub Committee for DB schemes with £50m+ of assets where one of the two consultants are the scheme advisor.
- To gain intelligence on these schemes in regards to the likelihood of them investing in the client and introducing them to the investment consultants of the schemes.

TARGET DATA

Chartered Developments created and supplied a database of 600+ schemes that matched the client's criteria.

THE CAMPAIGN

The campaign focused on delivering a message explaining the client's interesting history and approach to risk. There was a compelling USP that helped create a resonant message around an unknown brand.

THE RESULTS

- Chartered Developments have made 63+ meetings in 10 months to the qualifying standard set by the client.
- Good relationships have also been opened up with another 140 schemes.
- There is also now an excellent database of 532 schemes where the decision makers and their email addresses are known. The client owns this database which is their intellectual property.
- Many of the leads are now going through to beauty parades.

WHY CHARTERED DEVELOPMENTS?

Chartered Developments have been able to assist our client in meeting with potential clients who are considering their pension fund options in today's volatile economy.

Although the technical details of Fiduciary Management are complex, Chartered Developments are able to converse at a senior level to secure appointments, build relationships and raise brand awareness with key targets on behalf of our client.

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