2022 Key Trends in the United States Institutional Investment Consulting Business

Key Findings from the 2022 U.S. Institutional Investors Research

April 21, 2023

Executive Summary:

This report provides detailed information on investment consultant usage globally. Review the market position of leading firms, including those consultants most frequently considered for a new assignment.

Methodology:

Coalition Greenwich's 51st annual research with U.S. Institutional Investors is based on in-depth interviews conducted primarily through telephone interviews and online surveys, between February and November of 2022.

Respondents include 727 individuals from 590 of the largest tax-exempt funds in the United States. These U.S.-based institutional investors are corporate, public, union, and endowment and foundation funds, with either pension or investment pool assets greater than $150 million.

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