2024 Highlights of Investment Consultants Perspectives from Institutional Investors

2024 Canadian and U.S. Institutional Investors Studies

April 22, 2025

Executive Summary:

This report covers the latest trends in Investment Consultant relationships based on feedback from institutional investors.

Methodology:

In 2024, Coalition Greenwich undertook a study with institutional investors to assess the latest trends in Investment Consultant relationships. In North America, we interviewed 137 institutional investors to gather in-depth feedback on their views of the current consultant relationships they have, including major reasons for hiring and not hiring consultants, attributes they look for, searching methodologies for hiring, effectiveness measurement techniques, frequency of review of investment consultants and triggers leading to review.

Interviews took place between February and July 2024.

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www.greenwich.com | ContactUs@greenwich.com

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greenwich.com ContactUs@greenwich.com Ph +1203.625.5038