



AdvisorIntelligence

We help you navigate the investment landscape for your clients.



INVESTMENT RESEARCH

Independent, fundamental asset class analysis and deep qualitative manager due diligence. We set the bar high in evaluating investment opportunities, undertaking rigorous analysis of long-term drivers of investment performance.



CLIENT COMMUNICATIONS

Through our communications, we seek to instill client confidence in our competence, investment approach, and core values. We share white-labeled materials and redistributable messages to guide your own conversations with clients.



MODEL PORTFOLIOS

Portfolios based on rigorous, independent research and a disciplined process that seeks the highest conviction before enacting any investment decision. Our strategies meet the wide range of objectives, preferences, and financial goals of your clients.



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## About iM Global Partner

iM Global Partner connects high-quality investment firms with financial institutions, wealth advisory platforms and investors globally. The group is present in 16 locations across Europe and the United States and is comprised of 105 employees.

## AdvisorIntelligence

AdvisorIntelligence shares the proven investment strategies on which we have built our global asset management network. We share the in-depth proprietary investment research and model portfolios, along with high-quality client materials necessary to deliver advice with confidence.

Whether advisors are coming to us to fully outsource their investment decision-making or as a compliment to their own work, our web-based service allows users to access and implement these materials in a flexible way that meets the unique needs of their practice as they seek to build a scalable and sustainable business.

## Investment Approach

We are long-term, patient, fundamental investors with an approach grounded in intensive research paired with a disciplined process. We utilize both to achieve our goal of delivering superior risk-adjusted returns over the long-term for our client portfolios.

The key elements of our approach:

- Global Perspective
- Long-Term Approach
- Forward-Looking Analysis
- Discipline and Conviction
- Innovative Thinking
- Broad Access to Talent

Get instant access to investment research and client communications with a free trial of AdvisorIntelligence.

Contact our team for more information on our services

[www.advisorintelligence.com](http://www.advisorintelligence.com) | 925.254.8999 | [research@advisorintelligence.com](mailto:research@advisorintelligence.com)