

Case Study

Alternative Investment Market Entry & Advisory

The Challenge

A Wall Street investment bank and brokerage firm sought to expand its asset management business into higher profitability segments, to diversify its revenue streams and increase the company's competitiveness in the marketplace.

Patpatia & Associates' Activities

- ✓ Identified high-potential opportunities for market extension among traditional and alternative investments resonating with its existing institutional & private client relationships
- ✓ Implemented de novo hedge fund, real estate, and managed futures asset management capabilities, and extended its private equity business
- ✓ Structured unregistered & registered investment vehicles to maximize distribution reach, leveraging proprietary sales forces & third party channels
- ✓ Supplemented existing portfolio management skill sets through lift outs, alliances & acquisitions, as well as organic growth strategies
- ✓ Oversaw the launch & rollout process to ensure effective sales management and market adoption

The Results

Our client has been able to grow their asset management business in line with competitive demands, rapidly and efficiently. With a low capital investment, they have been able to broaden their reach in the alternative investment marketplace, bypassing the long lead time inherent in most money management launches.