



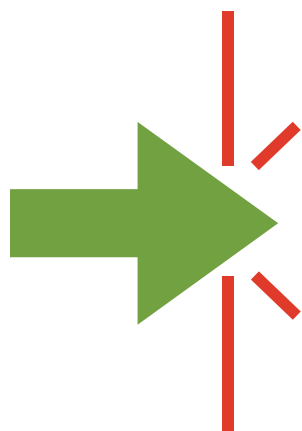
OCIO Expanding Beyond Loyal Core Clientele

Challenge: Loyal Clients, Unknown Outside Core Marketplace



A well-established specialist OCIO was seeking to expand its business beyond its core base of retirement plans and related regional foundations. Despite outstanding investment performance, the OCIO was having little success attracting new prospects or clients.

Approach: Identify and Address Bullseye Target Investors



Chestnut's approach to this project included:

- **Custom market research** – Our research revealed the client's current fund-of-funds structure did not meet any target investors' needs; current clients were simply loyal.
- **Comprehensive Strategic Growth Plan** – We recommended a new investment process and team structure, the creation of new vehicles, an upgraded and integrated client reporting system, and a go-to-market effort clearly articulating the firm's new value proposition.

Impact: Firm AUM Has Tripled



After using Chestnut's market research findings to convince the Board that the firm's legacy clients were at risk, the firm methodically implemented our recommendations. Over the following three years the firm's AUM has more than tripled, with over 90% of the assets coming from outside the firm's core market.