

MMI-CERULLI ADVISORY SOLUTIONS DATA

Frequently Asked Questions



MONEY
MANAGEMENT
INSTITUTE



CERULLI
ASSOCIATES

Research | Analytics | Consulting

Simplified Data Collection, Improved Insights

The Money Management Institute (MMI) and Cerulli Associates have partnered to generate unmatched insights and thought leadership for the benefit of advisory solutions industry constituents. Together, Cerulli and MMI will provide an enhanced view and understanding of the major trends at work in the advisory solutions marketplace by simplifying the collection and distribution of investment advisory data. Now, you can report and receive the quarterly global insights and perspectives you need through a single point of access.

Using the **MMI-Cerulli Advisory Solutions Data** platform, MMI members will access advisory solutions data through Cerulli. The insights will offer an in-depth overview of the investment advisory solutions marketplace, complete with an updated look and feel.

"Our collaboration will enhance the resources available to the leaders of the wealth and asset management industry, providing an enhanced view of the major trends at work in the advisory solutions marketplace. This arrangement is a win for all parties."

- Kurt Cerulli, Founder & CEO, Cerulli Associates

"Combining the broad perspective and real-world experience of MMI's members with Cerulli's expertise in asset management research and analytics will provide unmatched insights into the advisory industry."

- Craig Pfeiffer, President & CEO, Money Management Institute

Your Questions, Our Answers

When will the new reporting take place?

- Expect reporting to be live in Q4 2018.

What does this mean for you?

- If you report to MMI and to Cerulli separately, this partnership will streamline your reporting process. You will now only report to Cerulli.
- If you report to MMI and not Cerulli, you will receive an email with a login and instructions to start reporting to Cerulli.
- If you report to Cerulli and not MMI, the reporting process remains the same.

What will you receive?

- You will receive a quarterly data summary.
- You will also have access to the **MMI-Cerulli Advisory Solutions Data** platform located on Cerulli's Lodestar platform.

What type of data will MMI-Cerulli report on?

- Assets
- Inflows, Outflows, Net Flows
- Leaderboards by Program
- Traditional or Model Delivery
- Discretion
- Channel
- Category or Objective for SMA

For Sponsors:

- Assets by program type, channel, discretion
- Net flows by program type, channel, discretion
- Accounts by program type, channel, discretion
- Average account size by program type, channel, discretion
- Leaderboards:
 - *Top sponsors by program type, channel, discretion*
 - *Top programs by program type*

For Managers:

- SMA manager assets: total, traditional, model
- Top SMA manager leaderboard: total, traditional, model
- SMA assets and accounts by category and objective
- SMA manager leaderboard by category and objective

What type of output is supported?

- Excel
- PDF
- Web user interface

How do you gain access to the MMI-Cerulli Advisory Solutions Data platform?

- If you currently have a login to www.cerulli.com, the same login will suffice.
- If you previously had a login to MMI's OnDemand platform, a client service member of Cerulli's account management team will reach out via email and provide you with new login information starting in Q4 2018.
- If you did not previously have a login to MMI's OnDemand platform, and you plan to provide data to Cerulli, please email mmidata@cerulli.com and someone will follow up to provide a login and instructions starting in Q4 2018.

If you do not currently provide data, please email mmidata@cerulli.com to discuss your options.

About Cerulli Associates

Headquartered in Boston with offices in London and Singapore, Cerulli Associates is a global research and consulting firm that provides financial institutions with guidance in strategic positioning and new business development. Our analysts blend industry knowledge, original research, and data analysis to bring perspective to current market conditions and forecasts for future developments.

Cerulli's research product line includes the Cerulli Report series, the Cerulli Edge series, and Cerulli Lodestar.