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## Money Management Institute and Cerulli Associates to Consolidate Investment Advisory Solutions Industry Data *Industry Leaders to Combine Previously Separate Efforts*

**August 2018, Boston.** The Money Management Institute (MMI) today announced that it has entered into an agreement with Cerulli Associates (Cerulli) to transition MMI's investment advisory solutions data platform to Cerulli as of the third quarter of 2018.

Cerulli will integrate MMI's historical investment advisory data set into its existing operations and continue the industry-leading data collection and reporting processes that MMI has provided since 1997. The consolidated platform will be branded "MMI-Cerulli Advisory Solutions Data."

"Combining our data activities and efforts with those of Cerulli provides natural synergies that will benefit MMI members on several fronts," said Craig Pfeiffer, MMI President and CEO. "Through Cerulli, an acknowledged leader in research and analytics, our members will continue to receive the quarterly industry data report and insights they have come to rely on, and members providing data will have access to an online portal. This arrangement allows MMI resources to be aligned against other strategic priorities."

"The Money Management Institute and its members are natural partners for Cerulli Associates," said Kurt Cerulli, Founder and CEO of Cerulli. "Our collaboration will enhance the resources available to the leaders of the wealth and asset management industry, providing an enhanced view and understanding of the major trends at work in the advisory solutions marketplace. Many Cerulli clients are members of MMI and vice versa. This arrangement is a win for all parties."

MMI and Cerulli have also agreed to explore expanding the combined data set to include information about sustainable and ESG investing, deeper coverage of alternative investments, and more detailed data on specific distribution channels. The two organizations will form a council of industry leaders to drive future expansion of the data set, provide guidance on key terminology, and monitor the accuracy of the data.

Summarized Mr. Pfeiffer, "What is most exciting about this arrangement is the potential for us to generate unmatched insights and thought leadership for the benefit of advisory solutions industry constituents and their clients. Combining Cerulli's expertise in asset management research and analytics with the broad perspective and real-world experience of MMI's members is a truly powerful blend."

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## About Cerulli Associates

Founded in 1992, Cerulli Associates is a research and consulting firm specializing in asset management and distribution trends worldwide. Headquartered in Boston, Cerulli also has offices in London and Singapore. Cerulli blends original research and data analysis to bring perspective to current market conditions and forecasts for future developments. Cerulli provides firms with guidance in strategic positioning and new business development through a suite of research publications, an online data platform, and through custom research and advisory services. For more information, visit [www.cerulli.com](http://www.cerulli.com).

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

## About the Money Management Institute (MMI)

Since 1997 MMI has been the leading voice for the global financial services organizations that provide financial advice and professionally-managed investment advisory solutions to individual and institutional investors. Through programs focused on member interaction, education and professional development, data analytics and insight, next-generation initiatives, and thought leadership and advocacy, MMI supports and advances the growth of a diverse spectrum of investment advisory solutions that serve an evolving worldwide financial landscape. MMI member organizations are committed to the highest standards of fiduciary responsibility and ethical conduct and to creating the most successful outcomes for investors at every level of assets. For more information, visit [www.MMIInst.org](http://www.MMIInst.org).

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[press@cerulli.com](mailto:press@cerulli.com)

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**Cerulli Associates**  
699 Boylston Street  
Boston, MA 02116  
United States  
+1 617-437-0084

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**Cerulli Associates Europe Ltd**  
Valiant House, 4-10 Heneage Lane  
London EC3A 5DQ  
United Kingdom  
+44 (0)20 7645 9040

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**Cerulli Associates Asia Pte Ltd**  
10 Anson Road, #24-15  
Singapore 079903  
+65 6327 4045