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## Case Study: Growing the Investment Team at a Large Institutional Investor

A major institutional investment management organization, with tens of billions of dollars in assets under management, retained The QTI Group to help grow its investment team.

The organization was embarking on a strategic change in its asset allocation, shifting several billion dollars of its funds from external investment managers to internal management by its in-house investment team. The organization also planned to increase its oversight in the selection and monitoring of those external investment managers it continued to use. These changes were projected to deliver significant costs savings to the organization by decreasing the fees it pays to external investment managers. To accomplish these changes, the organization needed to augment its investment team with several new individuals whose expertise could expand its knowledge base in certain targeted areas.

The QTI Group's executive search team brought years of prior experience in recruiting investment professionals. This experience enabled smart, targeted outreach into the right professional communities, and sophisticated pre-interview vetting of candidates by The QTI Group's team.

Over a multi-year period, The QTI Group helped the organization hire over a dozen investment professionals, including a head of external fixed income funds, a portfolio manager, a head of trading and a senior trader, and several equity and fixed income analysts. Experience levels ranged from seasoned managers and strategists with decades of experience, to entry-level post-MBA analysts.

These hires included some local residents, and some who relocated for the opportunity. The QTI Group's executive search consultants facilitated interviews and provided on-the-ground support for traveling candidates, helping them navigate an unfamiliar city and introducing them to the community. This support helped to create a positive experience for visiting interviewees (and in some cases their families), contributing to the decisions of several candidates to accept employment offers requiring relocation.

The organization has continued its impressive track record of investment performance, regularly beating its benchmarks in one-year, five-year, and ten-year time horizons, while dramatically reducing its fees paid to external investment managers.

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