



The Investment Management Institute (IMI) and AK Advisory Partners are pleased to announce a strategic partnership to provide consulting services to the money management industry. IMI has provided training and research services to institutional investors for more than 25 years.

Andy Klausner, Founder and Principal of AK Advisory Partners, also has more than 25 years of experience in the industry, many working directly with investment managers. Andy helped build both the retail and institutional managed money platforms at Morgan Keegan, and developed the wealth management platform at Janney Montgomery Scott. He started his consulting company two years ago and has worked with the IMI for more than ten years. Please visit [www.akadvisorypartner.com](http://www.akadvisorypartner.com) for more information.

Our consulting partnership will focus on helping investment managers in three distinct, but complementary areas:

- **Business Development:** We help firms clearly define their competitive advantages and develop a game plan to market to their target audience in such areas as:
  - Marketing and Communications
  - Client Loyalty
  - Growing Referrals
  - Client Servicing
  
- **Brand Solidification:** Presenting a consistent message is an important component of establishing a recognizable brand. We work with investment managers to help develop:
  - Logo and Corporate Identity Packages
    - Mission Statements
    - Value Propositions
  - Corporate Websites
  - Client Presentation Books
  - Brochures / Marketing Collateral
  
- **Operational efficiency:** We perform custom Strategic Assessments to help clients emerge as the winners from the changing financial services landscape by evaluating their existing:
  - Organization
  - Strategic Plans
  - Marketing Materials
  - Target Client Markets

Please contact Andy Klausner at (617) 990-6894 ([andy@akadvisorypartners.com](mailto:andy@akadvisorypartners.com)) or Russ Mason at (203) 622-5851 ([rmason@imi-ct.com](mailto:rmason@imi-ct.com)) for more details.