

CASE STUDY

Wealth manager expands their research and improves client communication with eVestment

Glenmede Trust Company utilizes eVestment solutions for investors to better manager research and communication with stakeholders

GLENMEDE

\$41B

FIRM AUM

6:1

CLIENT/EMPLOYEE
RATIO

50

STATES OF CLIENTS

The Glenmede Trust Company is an independent, US-based wealth manager with more than \$41B under management. Glenmede is focused on providing clients the responsiveness of a small, boutique firm, coupled with the infrastructure and resources of a large organization.

It turned to eVestment for comprehensive data on managers offering institutional funds across the world, analytics tools for screening managers, and a document library of consultant ratings, commentary and other qualitative intelligence.

Broader, more efficient manager searches

Glenmede officer Dane Weinberger says his firm turned to eVestment for “a robust, institutional manager search tool that would [also] help us effectively communicate content to prospects and clients.”

“With eVestment, we are now able to conduct wider, more efficient manager searches. Before, we had to email a wholesaler for a deck of performance information. Now, manager pitch books, performance and more are available by logging into the platform.”

Better client communication

According to Weinberger, Glenmede also relies on eVestment for communicating key data to clients

“We really value eVestment as a one-stop tool that expedites and enhances the quality of our research and enables us to effectively communicate with internal and external stakeholders.”

Dane Weinberger, *Glenmede Officer*

about their managers. “We found even more value by using eVestment to improve how we communicate with clients. With the eVestment team’s help, we built out templates so we can now easily run a manager through the template and generate a cohesive, concise five- or six-page deck of key information for clients on their managers.”

More productive meetings

“We consult the eVestment document library to read manager reviews conducted by large institutional investors and investment consultants, so we’re aware of any issues that may be surfacing. That way, when we get on the phone with managers, we’re ready to have a more productive, more robust dialogue.”

Glenmede has also configured dashboards in eVestment, which Weinberger says “provides us with an easy way to watch managers and know key questions to ask when we have our quarterly calls. It helps us do due diligence on our managers

so we’re better prepared to discuss potential issues internally.”

Data, analytics and reporting – all in one platform

Having a single platform with quantitative data, qualitative data, analytics and reporting was a key consideration in Glenmede’s buying decision.

“eVestment stood out to us because it’s a one-stop shop solution. The platform executes on all dimensions of what we’re looking to accomplish – whereas other platforms we evaluated were only able to give us part of the total equation. With eVestment, we can search managers, analyze and compare them and get qualitative intelligence on them all from one platform. We can also report on our analysis for communicating with internal stakeholders, clients or meeting with managers. All of this has been really powerful for Glenmede and our ability to provide unparalleled service to our clients.”