

Advisory Services Update

Middlemark Partners, LLC (“Middlemark”) advisory business enters into its second year, and we are pleased to update you on the services that we are currently offering to our institutional clients. The Advisory team is headed by Daniel MacDonald with Jeff Lee and Luke Hinshelwood rounding out the team.

Solutions Informed by Best Practices of a Sophisticated Institutional Investor

Middlemark has recently worked with institutional investors to perform internal process and skill-set analysis and has carried out the implementation of a managed account platform (“MAP”) to encompass all of Middlemark’s recommended best practices.

Case one: a midsize pension investor’s entire organizational / investment team structure and makeup was analyzed and retooled—to include a new training program and fixes to alleviate workflow issues and skill gaps.

Case two: a large pension investor has been working with Middlemark to establish their managed account investing, a process starting with research into MAPs and through working directly with managers to transition to the customized structure and terms recommended by Middlemark.

Bespoke solutions for institutions, family offices, and moderate-sized fund managers

Middlemark’s advisory services are tailored for:

- Institutional investors looking to adopt **managed account platform** best practices
- Investors seeking to **build internal hedge fund allocation expertise** and **reduce reliance on Fund of Fund’s and Consultants**
- Investors seeking unique managers via **emerging manager advisory and searches**
- Family offices seeking **investment and operational diligence assessments**

Advice from seasoned institutional investors and operations executives

Prior to joining Middlemark earlier last year, Mr. MacDonald spent sixteen years with Ontario Teachers’ Pension Plan Board (OTPP), where he helped create and implement some of the best practices in hedge fund investing. His responsibilities included investment due diligence, manager selection, portfolio construction, managed account investing, and fee structuring.

A note from Mr. MacDonald:

“Current clients have been quick to adopt and implement our recommended best practices in the areas of managed account investing, organization of internal resources, fee structuring, and due diligence.”

Knowledge transfer is the cornerstone of our advisory services

Middlemark’s advisory offering is uniquely differentiated from the competition. In addition to helping clients build their internal teams and infrastructure, our Advisory services will also focus on helping clients transition from relying on costly Fund of Funds and Consultants to more cost efficient direct investing. Middlemark’s Advisory team actively works with clients’ internal teams to recruit, train and develop staff and to incorporate best practices across governance, investment process, manager selection, portfolio construction, managed accounts, negotiating and structuring fees and terms, customizing investment mandates and manager monitoring.

We are happy to help.

For more information on how you can take advantage of Middlemark’s Advisory Services, please email daniel@middlemarkpartners.com