



City/State:
New York City/
New York

Client:
NYC Comptroller

Industry:
Investment/Finances

The Client

The Bureau of Asset Management (BAM) is the investment advisor to the Pension Funds of the City of New York. There are five major retirement systems which represent the majority of the approximately \$194 billion under management. As the investment advisor, BAM assists the five New York City Pension Funds in selecting public market investment managers and finding private market investment opportunities. The Pension Fund has about 303 Investment Managers overseeing ~2,390 accounts.

The search for managers and investment partners is based on being “in the market” and making contacts to source strong investment opportunities. The staff is aided by several consultants who take part in several ways of finding and ultimately hiring managers. They must oversee existing managers to ensure they are fulfilling their obligations and also take part in industry events to meet potential investment managers.

Problem

The goal of this project was to support BAM’s staff through the cycle of meeting, sourcing, hiring, and monitoring managers. In addition to tracking interactions with managers and others, BAM was also looking to store the many documents associated with investments in a central repository, ranging from pitch books to annual statements.



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The Solution

Deployed Microsoft Dynamics Customer Relationship Management (CRM) for the Comptroller's Bureau of Asset Management ("BAM"). The goal was to use CRM to support BAM's staff through the cycle of meeting, sourcing, hiring and monitoring managers. In addition to tracking interactions with managers (and others), the CRM was also used to store the many documents associated with investments, ranging from pitch books to annual statements.

