



# CAPITAL MARKET CONSULTANTS

222 EAST ERIE STREET MILWAUKEE, WISCONSIN 53202

WWW.CMARKC.COM 414-727-7995

*Building Business Together*

## INVESTMENT PROGRAM EXPERTISE

### Investment Manager, Mutual Fund and Alternatives Research

- Transparent, documented process
- Initial roster evaluation
- In-depth manager searches
- Ongoing due diligence, including detailed research reports, quarterly updates, and on-site manager visits
- Advanced analytics: in-depth style analysis and performance attribution
- Fact sheets, style maps, scorecards, multi-product portfolio structuring and client presentation materials

### Economic Consulting

- Timely written updates on key developments
- Quarterly newsletter (licensed for private-label use)
- Conference calls
- Client Presentations

### Portfolio Modeling & Client Profiling

- Investment program consulting
- Client questionnaires and scoring systems
- Asset allocation
- Portfolio modeling
- Capital market assumptions
- Client education

### Unified Managed Accounts (UMA)

A UMA is a technology-enabled client account in which separate accounts, mutual funds, ETFs, and other securities can be pooled to achieve simplicity, cost savings, and portfolio objectives.

- Institutional-quality managers at modest account minimums
- Customizable, tailored to each client
- Centralized asset location and simplified client reporting
- Prepackaged model portfolios available

## ABOUT US

### About Us

Founded in 2002 and located in Milwaukee, we serve a broad range of clients throughout the United States. Flexibility and choice define our consultative approach to service.

### Mission

Our mission is to advance the financial well-being of investors and to make it possible for financial intermediaries to be the investment provider of choice in their local markets.

### Clients

CMC serves various intermediaries that outsource key research investment program functions. This enhances their ability to service to clients, differentiates them and documents a thorough execution of fiduciary responsibilities. Our clients include banks, trust companies, wealth management firms, broker-dealers, accounting firms, law firms, insurance companies, and family offices.

### Team

CMC employs seven associates. Our credentialed staff has over 100 years of combined investment experience.

### Independent and Impartial

The freedom to provide impartial, independent and objective advice is fundamental to who we are as an organization. We are not affiliated with any investment management firm nor do we receive compensation from any such organization for recommending their investment strategies. CMC is privately held.

*For more information contact Barry Mendelson at 414-727-7995 or [barry@cmarkc.com](mailto:barry@cmarkc.com).*