



WILBANKS PARTNERS

US Institute CFO/COO Roundtable

“Shifting Gears – Positioning Organizations for New Products & Clients”

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May 2024

Segmentation of Investment Firm Professional Responsibilities



- Critical that every professional in leadership roles in each of these functional silos is in agreement about the *equal* importance of the other functions.
- Recognition that technology expertise, innovation and application has become a huge driver of success in all three domains.

Conflicting Leadership Roles

- **Continuous improvement cultures** are essential to drive efficiency, particularly in legacy public market asset class managers. Very difficult transition from the historical growth oriented, high profit margin cultures that have worked so well since ERISA/1974, and still are working well in the private market asset class managers.
- **Innovation cultures** necessary to create new areas for growth (such as public market managers migrating to private markets) and to increase the sophistication and customization of client service delivery (such as solutions-based investment strategies) *pull against the drive for efficiency*. This requires nimble and assertive leadership skills in balancing priorities and keeping teams focused on moving forward.