



## **Coughlin Associates**

Coughlin Associates is a national investment research firm specializing in working with investment firms, financial planners and brokers who are seeking cost effective solutions to enhancing their investment research. We have perfected the virtual investment research team and have been providing these services to various companies over the past few years.

### *Virtual Investment Research Team*

The concept of a virtual research team is fairly new in the industry. Many people are not fully aware of the advantages and benefits this approach can provide to a company and their clients. Also, it can be somewhat confusing as to what a virtual investment research team really is and truly provides.

### *Why Outsource to a Virtual Investment Research Team?*

- Adding a virtual research partner allows you a higher level of experience and expertise than might otherwise be possible
- Allows you to accommodate those clients' requesting individually invested portfolios
- Provides enhanced quality of your investment product
- Provides a disciplined equity approach for your clients
- Allows you to free up time for client servicing and sales
- Allows you to reduce fixed costs
- Allows you to reduce staffing levels and personnel issues
- Allows you to bring your client investments back in-house

### *When Should You Consider a Virtual Research Team Member?*

- When you want to be able to offer your clients a higher degree of portfolio customization and attention than would be available from mutual funds or wrap account managers
- When you want to free up more of your own time for client servicing and sales
- When you want to enhance your firm's image for professionalism, expertise, experience and depth of staff
- When you want to reduce your fixed costs while enhancing the quality of your firm's investment skills
- When you are seeking to grow your business, Coughlin Associates' provides tools and the ability to provide individually invested portfolios to clients which allow you to accelerate the growth of your business
- When you are seeking a greater consistency of returns over time, we provide a disciplined investment approach that has helped clients over the years

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### What Can Coughlin Associates Provide You?

- Everything you need for your equity investing needs:
  - Investment research and reports
  - Investment recommendations
  - Investment lists and required documentation
  - Strategy publications and economic updates
  - Research commentary for you and your client service officers
  - Interim updates and company comments
  - Weekly teleconference meetings
  - Prompt notification of any recommendation changes
  - Quarterly economic investment strategy pieces that can be shared with your clients
  - All materials provided for use under your brand
- Complete confidentiality of client information
- You retain all client contact responsibility
- Coughlin Associates can help you in the sales process, as well:
  - Participation in client and prospect meetings when necessary
  - Consultation on development of investment marketing materials
- Coughlin Associates can become part of your team, contributing to your success.

### Why Coughlin Associates?

- Highest level of investment skills and professionalism
- Many years of experience in dealing with the investment needs of high net worth investors
- A focused, disciplined approach to investing
- Knowledgeable professionals who are committed to your success
- We are not in competition with you, we become part of your team
- We can be easily integrated into your marketing materials enhancing your team approach to help you win new clients
- We help differentiate your firm from your competitors

### The Company History

With over 30-years of investment management and research experience with such prominent international firms as Bank of America and NationsBank, Barring formed Coughlin Associates in 2000.

Barring understands the challenges facing investment advisors, and their need to grow fees while maintaining tight controls over quality and expenses. He also understands that many investment advisors need to offer their clients individually invested portfolios,

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yet the research task continues to become more complex, time consuming and expensive. This knowledge and understanding formed the foundation for the business model he developed.

Coughlin Associates affords clients the ability to work with a highly experienced investment professional for customized investment research, for a flat monthly retainer fee. This is extremely cost effective for firms when they compare the monthly retainer to hiring investment professionals on staff.

## **Contact Us**

For additional information regarding Coughlin Associates and to discuss how our services may be of benefit for your company, please contact:

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