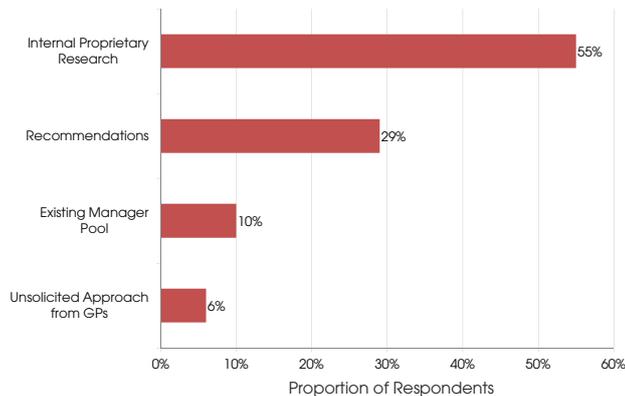




# Wealth Manager Survey

An analysis of the key stats from Preqin's latest survey of wealth managers investing in alternative assets.

**Fig. 1: Wealth Managers' Primary Method of Sourcing New Investment Opportunities**



Source: Preqin

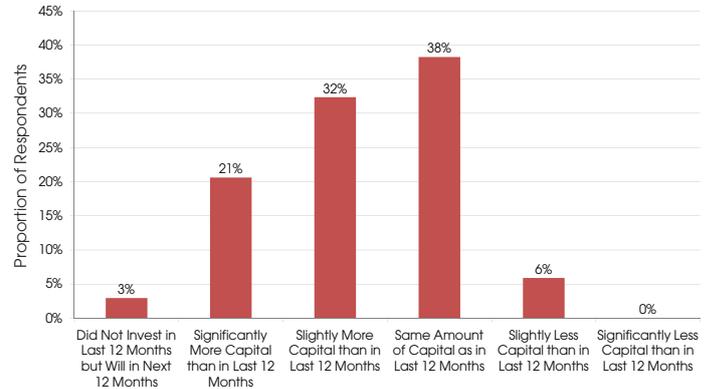
Wealth managers and their clients represent a significant part of the private investor universe, pooling together capital from several different types of private investors in alternatives. In order to investigate this important sub-sector of the investor universe, Preqin conducted in-depth interviews with 35 wealth managers, all of which are active investors in one or more alternative assets, representing a global sample of the wealth management industry.

Wealth managers in alternatives take a highly active approach in sourcing and evaluating the investments they both recommend to and make on behalf of their clients. Fig. 1 shows the primary process through which these gatekeepers identify potential investment opportunities for their advisory and discretionary mandates.

Only 10% of wealth managers primarily source investment opportunities by turning to their existing manager pool. Instead, the vast majority (84%) actively seek and identify investment opportunities in more proactive ways. This is either through their own internal proprietary research, or based upon recommendations from their peers and other market participants. It is noteworthy that more than half (55%) of wealth managers primarily rely on their own in-house investment research when sourcing investments in alternatives.

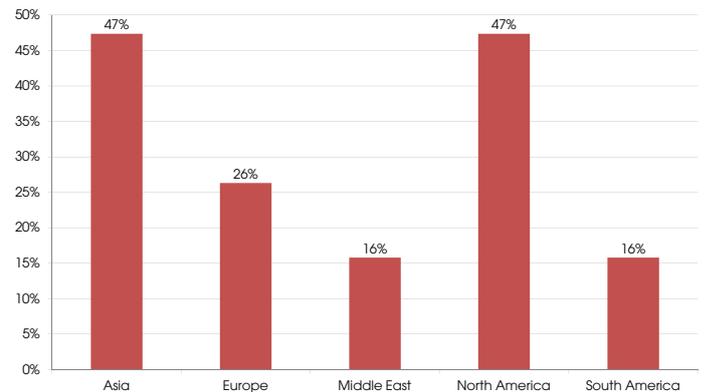
On the whole, wealth managers that actively invest in alternatives expect to increase their level of activity in the market over the next 12 months, when compared to the previous 12 months, as shown in Fig. 2. Fifty-three percent of wealth managers interviewed by Preqin expect to increase or significantly increase their exposure to alternatives, while a further 3% that did not make investments in 2011 intend to invest in the next 12 months. Just 6% of wealth managers expect to commit less to alternatives over the coming 12 months, and no wealth managers expect to significantly reduce the level of their clients' commitments to alternatives.

**Fig. 2: Amount of Capital Alternatives Wealth Managers/ Clients Plan on Committing to Alternatives in Next 12 Months**



Source: Preqin

**Fig. 3: Regions Viewed by Wealth Managers as Presenting the Best Opportunities in Real Estate**



Source: Preqin

Geographically, 47% of wealth managers see North America as presenting attractive opportunities for real estate investments, with the same proportion seeing opportunities in Asia. Europe is seen as presenting attractive opportunities by 26% of wealth managers, while the Middle East and South America are each seen as attractive by 16% of firms.

## Data Source:

Preqin's Real Estate Online now features [in-depth profiles](#) of wealth managers, an important investor group involved in the asset class.

For more information and to arrange a walkthrough of the service, please visit:

[www.preqin.com/wealth](http://www.preqin.com/wealth)