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## NEWS RELEASE

### **ECHELON Announces the Release of *Driving Profits: An Executive's Roadmap to Financial Success in Retail Separate Account Management***

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ECHELON Partners announced the release of *Driving Profits*, a report that details seven specific strategies to maximize profitability in the retail separate account space. The report was paired with an executive seminar held in six cities across the U.S. and geared toward retail separate account professionals. ECHELON's professionals have conducted more research on the financial aspects of the managed account business than any other firm.

ECHELON realized the requisite nature of this report as research shows that while the managed account space is one of the most potent profit opportunities in the financial services industry, most firms are currently performing below an attractive level of profitability. *Driving Profits* sets forth seven concrete strategies by which to capture profitability, and develops a detailed picture of financial excellence and how to control the variables that drive this excellence. Each strategy was researched extensively and carefully constructed to be understandable and actionable.

"Excellent decisions require precise intelligence, which is often impossible to find," states Dan Seivert, CEO and Managing Partner of ECHELON Partners. "ECHELON specializes in conducting the research necessary to develop this intelligence, and package it in a way that makes it easy to use and to customize for the specifications of your company." The professionals at ECHELON have spent hundreds of hours working with and interviewing senior executives from separate account investment management firms of all sizes, as well as the program sponsors and technology vendors that work with them. Along the way, they developed a detailed picture of financial excellence and an understanding of how to control the variables that drive this excellence.

Among the strategic advice provided within the 220-page report are the strategies of 'Knowing the Big Picture,' which helps companies learn to recognize entry opportunities, capital-raising techniques, and acquisition possibilities, and 'Understanding the Economics,' which encourages executives to participate in financial calculations. These and the other five strategies described in detail in the report help the company raise equity value and profitability to the level that only industry leaders enjoy.

### ABOUT ECHELON PARTNERS

ECHELON Partners (ECHELON) was formed in 2001 to offer investment banking and consulting to a subset of the financial services industry known as "investment product developers and distributors" (IPDADs). Since that time, ECHELON's professionals have helped hundreds of senior executives envision, initiate, and execute a multitude of complex business strategies and transactions. ECHELON's business is making companies more valuable through delivering advice and orchestrating transactions. Accordingly, ECHELON measures its success in the enterprise value it creates for its clients. Companies that strive to outperform their peers choose to work with ECHELON because we are as passionate about their results as they are.

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