

How to Successfully Cover a Broker-Dealer

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Do you have a strategy when covering broker-dealers? We believe getting to know the mindset of the intermediary is critical for asset managers to ensure your firm is approaching and covering them correctly. With hundreds of broker-dealers in the industry, we recommend breaking the broker-dealers into four quadrants which will help you successfully understand and create a consistent approach of coverage for each.

Foreside's Distribution Consulting team created the below one-pager which goes into this model deeper.

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