



# The Investment Ecosystem<sup>SM</sup> Academy

## Advanced Due Diligence and Manager Selection

### Topics

If you have questions, please contact Tom Brakke via [email](#), or schedule a [call](#) or [Zoom](#) session.

Listed below are the major topics for the online course. Each one has multiple parts, including presentations, ebooks, links to additional material, and exercises. Since every person starts at their own time and proceeds at their own pace, there are no live sessions, but participants can schedule phone calls or Zoom sessions with Tom Brakke.

#### *Part One*

The first part of the course examines the foundational building blocks of analysis for those trying to understand the key elements of an asset manager. Participants are exposed to a variety of ideas that help them examine and hone their preferences regarding the key differentiating factors in each topic area.

Introduction	Leadership
Concepts	Individual and Organizational Behavior
Forecasting	Human Capital
The Ecosystem	Incentives
Categorization	Organizational Structure
Beliefs	Teams
Narratives	Decision Making
Culture	Investment Process
Manager Characteristics	Complexity and Transparency

Scale, Flows, Capacity, and Life Cycle

Fees

Portfolio Analysis

Emerging Managers

Performance

Strategies

## *Part Two*

In this part, the components of the manager research process are explored. Practical ideas are given to avoid the common problems and traps from the beginning of the process to the end.

Environment and Strategy Evaluation

Due Diligence From a Distance

Sources of Ideas

Third-party Research

Gathering Manager Information

References and Background Checks

Intelligence Analysis

Reports and Presentations of Findings

Onsite Visits

Manager Selection Processes

“Ways In” Topics

Ongoing Research

Interviewing

Judging the Quality of Research

Operational Due Diligence

Sign up [here](#).