

Unmatched Breadth of Services for Independent Board Members

	Board IQ	Fund Board Views	Fund Directions	FUSE Business Intelligence For Fund Boards	Independent Directors Council	Mutual Fund Directors Forum
NEWS, TRENDS & INDUSTRY DEVELOPMENTS						
Board Governance	✓	✓	✓			
Legal Issues	✓	✓	✓			✓
Compliance Matters	✓	✓	✓			✓
Regulatory Developments	✓	✓	✓			✓
News Aggregation – curated by FUSE to match client interests				✓		
3rd Party Reports – synthesized by FUSE to save you time				✓		
FUSE Proprietary Research – access to the full library of industry briefs, white papers, surveys and studies				✓		
MARKET ENVIRONMENT						
New Product Developments – investment strategy trends, new vehicle structures, pricing innovation, future of '40 Act funds				✓		
The Business of Investment Management – margins, consolidation, outlook/forecast				✓		
The Business of Distributors – changing demands & support requirements, decreased access and ability for managers to influence				✓		
Manager Selection Process – sales, marketing and product implications for asset managers				✓		
EVALUATE YOUR ADVISOR						
Strategic Assessment – compares advisor's business relative to industry landscape				✓		
Competitor Comparison – tactical SWOT analysis vs. targeted group of peers				✓		
Product Line Scorecard – marketability of the product line, opportunities for growth, and sources of outflows				✓		
Alert Service – ongoing monitoring of the advisor and topics of specific interest to the independent directors				✓		
BOARD BEST PRACTICES						
Board Composition – latest age, gender, diversity metrics				✓	✓	
Director Compensation – complex size, tenure, structure, plus custom break-outs by factors unique to your fund complex				✓	✓	
Committee Structure – categories, membership, temporary vs. standing				✓	✓	
Candidate Referral for Board Openings – FUSE will provide a list of names that match your needs (expertise, cultural fit)				✓		✓
PERSONALIZED ENGAGEMENT						
Discussion Forums – moderated networking with independent director peers	✓	✓		✓	✓	✓
Education Sessions – select from a wide range of topics to design briefings specific to your board's needs				✓		
15c Review – evaluation of the overall process including report design, coverage areas and peer groups				✓		
Consulting Support – research for ad hoc requests				✓		
M&A Transitions – advice and guidance associated with product line combinations and board consolidations				✓		

Benefit from FUSE's deep knowledge of industry trends, experience evaluating registered funds, and willingness to directly engage and advise Independent Directors... just a few reasons why FUSE is unrivaled.

To learn more, please contact Jason Heinhorst at 720.221.5223 or jheinhorst@fuse-research.com