



A Global Investment Network

Giving you access to ‘best-in-class’ investment managers from around the world



Who we are

iM Global Partner was founded in 2013 with the mission to **connect high-quality investment firms** with institutional investors, wealth managers and financial intermediaries globally.

2013
FOUNDED IN

~37
BN USD AUM*

11
GLOBAL
LOCATIONS

What we do

We select **proven, high-quality investment managers**, our **Partners**, from around the world in order to bring **high-quality investment solutions**, best-in-class services and strategic research insights to our clients.

Our Partners are entrepreneurial by nature, mid-sized investment firms and independently owned - with long-term track records of providing reliable investment solutions to clients.

A Worldwide Investment and Distribution Network Dedicated to Active Asset Management

Research and Investment

Strong due diligence capabilities and investment expertise allowing the acquisition of non-controlling stakes in some of the best independent traditional and alternative active managers.

Business Development

Quality and excellence in execution and service are part of our core beliefs to ensure that we build long-lasting, entrepreneurial business relationships with our clients, offering them only the best.

Asset Management

Construction, management, oversight and monitoring of diversified ranges of active investment products delegated to selected best-in-class investment teams.

Source: iM Global Partner, data as of January 2023.

*Assets under management include Partner assets in proportion to iM Global Partner's non-controlling stake.

FOR PROFESSIONAL INVESTORS ONLY - NOT FOR GENERAL DISTRIBUTION.

Developing a Premier Global Investment Network



Founded in 1979 and based in Boca Raton, Florida. The firm had \$63.0bn AUM as of January 2023. Polen Capital is a **high conviction growth investment manager**. Polen Capital's strategies are based on the same repeatable investment process building for the long-term.



Founded in Chicago in 1997, independently owned and controlled by the two partners Daniel Dolan (founder) and Roger McEniry, Dolan McEniry is a **value investor in U.S. corporate bonds**. The firm had \$7.5bn AUM as of January 2023.



Founded in Boston in 1999 invests in **mid to large capitalization companies** on a global basis, with a primary focus on the US, and employs both long/short and long only strategies. The firm had \$0.8bn AUM as of January 2023.



Founded in 2012, Dynamic Beta investments is a New-York based **innovator in the liquid alternatives space** with one of the longest live track-records. The firm had \$2.2bn AUM as of January 2023.



Founded in 1983 and based in Los Gatos (California), Scharf Investments manages **US and global equities as well as multi-asset strategies** with a fundamental bottom-up and focused long-term value approach. The firm had \$4.0bn AUM as of January 2023.



Founded in 2005, Zadig Asset Management is a **European equities specialist**. Zadig AM also has an innovative approach to **ESG with SARP** (Sustainable At a Reasonable Price). The firm had \$2.2bn AUM as of January 2023.



Renowned New York-based **asset allocation specialist** founded in 2009 by Richard Bernstein. RBA runs a range of **top-down asset allocation strategies invested in ETFs** with a look through approach into their underlying securities. The firm had \$14.6bn AUM as of December 2022.



Founded in 1989, based in Atlanta, Georgia, APA specializes in managing **high quality tax-exempt and taxable municipal bond portfolios**. The firm had \$6.0bn AUM as of January 2023.



Founded in 1986, based in Pennsylvania, Berkshire AM is an **independent advisor specialized in dividend focused equity portfolios**. The firm had \$4.2bn AUA as of January 2023.

iM Global Partner

At a Glance

#1

We seek to generate sustainable alpha for our clients through a diversified multi-boutique model that combines entrepreneurial spirit and diversity of investment talent.

#2

We acquire long term minority stakes in asset managers, our Partners. They are independent and preserve the unique culture that have made them successful.

#3

We leverage over 20 years of in-depth research on more than 300 asset management firms to tunnel down and select outstanding asset managers.

#4

We provide robust, active investment strategies and first class services for institutional and individual investors.

A Global Presence

Our International Offices

Paris

+33 (0)1 88 40 75 08
20, rue Treilhard
75008 Paris
France
contact-FR@imgp.com

London

+44 (0)20 38 089 834
62 Threadneedle Street
EC2R 8HP London
United Kingdom
contact-UK@imgp.com

Luxembourg

+352 26 27 36 -1
10-12 boulevard F.D. Roosevelt
L-2450 Luxembourg
Luxembourg
contact-LU@imgp.com

Los Angeles

+1 (323) 238 4518
2301 Rosecrans Ave,
Suite 2150
El Segundo, CA 90245
United States
info-us@imgp.com

Walnut Creek

+1 (925) 254 8999
1676 N. California Blvd,
Suite 500
Walnut Creek, CA 94596
United States
information@lgam.com

Frankfurt

+49 170 557 0046
contact-de@imgp.com

Miami

+1 (305) 487 3870
contact-usoffshore@imgp.com

Milan

+39 02 829 56 699
contact-it@imgp.com

Zurich

+41 (0) 44 214 64 74
contact-ch@imgp.com

Stockholm

+44 (0)20 38 089 834
contact-uk@imgp.com

Madrid

+34 91 198 77 18
contact-es@imgp.com