

Hi Jennifer,

Thank you so much for your answers to our questions – they were very helpful in allowing us to better understand Company A and how we might be able to partner together to achieve your goals for data and intelligence at the firm.

The first thing that stood out to me was the number of analysts you have supporting your investments compared to the number of advisors you have servicing your clients. We have some tools to help with advisor efficiency and client communications, but first, I would like to dive into our data and intelligence tools to support your research team.

I see that getting the right technology into the hands of your research team is a top priority, and I think we have a few tools that could help you out. These tools would free up some of their time so that you can expand your investment portfolio and better service the clients.

The first tool is Bloomberg Intelligence, also known as BI. We have a team of over 350 research professionals covering 135 industries and 2,000 companies. They also cover credit, which I know is an area into which Company A would like to expand. BI can give you the capacity to do this.

With BI in hand, your research team will have access to information aggregated from hundreds of independent data contributors, allowing them to understand trends impacting markets and individual securities in a fraction of the time. This will make it easier for them to make better-informed investment decisions and to stay on top of current investments.

BI would be a great fit for Company A, as it is integrated with Bloomberg Terminal, which I know you are already using. This means that it can be accessed via a program your team is already using every day. It's organized by industry, topic, and theme, making information easy to find and easy to digest.

The platform is supported by BI analysts, who are available to answer questions your research team might have, as well as industry chat rooms, important research alerts, and webinars.

Would you be interested in setting up a tutorial with your research team so they can see the tools in action?