

To: Jennifer@CompanyA.com

Subject: Your Bloomberg Consultation

Dear Jennifer,

Thank you again for your interest in Bloomberg products. My name is Jon, and I will be your point of contact on the Analytics team. I'm excited to learn more about Company A and get your team set up with our industry-leading tools for wealth-management firms.

To match you with the best products for your needs, I have a few questions about Company A's business, listed below.

1. I see that you have provided an overview of the company's equity investments. What other assets does your firm invest in?
2. It looks as if your equity investment team is doing a great job at beating the market (24% returns vs. 10% returns). Can you provide any insight into how they approach researching investments?
3. What isn't working with your current software?
4. What are your biggest pain points in managing client relationships?
5. What are the firm's biggest pain points?
6. Who makes product decisions at the firm?

I look forward to speaking with you soon. Please let me know if you have any questions for me.

Thanks so much,
Jon

There are dozens of open-ended questions you could have asked Jennifer. Some additional examples are listed below.

Q: I see you have two equity analysts. Do you have analysts supporting other asset classes?

Q: What assets do you not invest in that you would like to invest in?

Q: Company A's Core Equities Fund's performance is impressive (64% vs. 10% S&P 500). Why aren't more clients invested in this asset?

Q: How does Company A determine what equities to invest in?

Q: What tools does Company A use to make investments?

Q: Your average investment size for equities varies quite a bit. How does Company A optimize the investment portfolio?

Q: Why are only 30% of clients invested in equities?

Q: I see that for some of the investments, investors haven't received an update in some time. Can you tell me more about how this process works?

Q: How do you execute trades on behalf of clients?

Q: What would make communicating with clients easier?

Q: Are you currently satisfied with your Bloomberg Terminal subscription?