

# marcus evans Summits Success Story



**Simon Bedard**  
**Vice President - Institutional Sales**  
**Mackenzie Investments**

We  
expect  
to raise  
at least  
EUR 100  
million

"**marcus evans** is a key marketing channel we use to get organised, pre-qualified introductions to a wide variety of institutions. The Summits have been very effective at opening new doors that we otherwise may not have had access to. We expect to raise at least EUR 100 million over the next two years," said Simon Bedard, Vice President – Institutional Sales, Mackenzie Investments, an investment management firm at recent **marcus evans Global Investors Summits** and **European Pensions & Investments Summits**.

## **What new doors have the Summits opened for Mackenzie Investments?**

Over the last few years, we have been proactively marketing into continental Europe and the UK, but with a fairly small team dedicated to the institutional business and no boots on the ground in Europe, we have come to leverage the **marcus evans** Summits from a business development perspective.

**marcus evans** Summits are unique with the face-to-face meetings they offer with a pre-qualified list of institutions. We can qualify prospects quickly and decide who we can engage with in more detail on a longer-term basis. It creates opportunities to align investor needs with our investment capabilities and start a process of longer term engagement with them.

## **What was the outcome of your one-to-one meetings?**

We have over 15 live discussions at different stages of the pipeline. Our sales cycle is long, so we are continuing to dialogue and are hopeful that within the next two years we will have at least two new clients derived directly from the meetings. We expect to raise at least EUR 100 million and will be pleased with that outcome.

## **Could you have met these investors anyway?**

Very few of the investors we met at **marcus evans** could we have met organically or through other channels. We are based in Canada targeting multiple regions from a distance. It is difficult to penetrate markets and secure meetings directly with institutions particularly in the heavily intermediated markets. There is a lot of competition and gatekeepers make it more difficult to access institutions directly. As an example, we often may get redirected to investment consultants, who are also increasingly harder to get in front of. I would suggest that approximately 90 percent of the institutions we meet through **marcus evans** we otherwise would not have had a chance to have a direct conversation with.

## **Do you find the one-to-one meeting format efficient?**

The format is very effective. The amount of time is just right. It encourages asset managers to be very smart and efficient in how they present themselves. We are there to generate investor interest to a level that encourages follow-up meetings and discussions. The casual networking sessions also allow us to deepen the discussions further.

## **How do marcus evans Summits compare to other industry events?**

The structure is very unique. Other industry events are more traditional, with some exceptions. Most do not have formal one-to-one meetings but softer networking opportunities instead. They often do a poor job of managing the ratio between asset managers and institutions, so usually far too many asset managers are vying for the attention of a few institutions. That makes it a very challenging and noisy environment for us. **marcus evans** manages that ratio very well.

To access more **marcus evans** Success Stories, please visit the website:  
**[www.summitcasestudies.com](http://www.summitcasestudies.com)**

Contact: Sarin Kouyoumdjian-Gurunlian  
Press Manager, **marcus evans**, Summits Division  
Tel: +357 22 849 313 / Email: [contactus@marcusevansuk.com](mailto:contactus@marcusevansuk.com)

All rights reserved. This content may be republished or reproduced.  
Kindly inform us by sending an email to  
[contactus@marcusevansuk.com](mailto:contactus@marcusevansuk.com)