

**SUMMIT STRATEGIES GROUP RECOGNIZED AS A 2015 GREENWICH QUALITY LEADER<sup>SM</sup> IN OVERALL US INVESTMENT CONSULTING**

Summit's clients have once again rated the firm highly enough that we are one of only three consultants nationwide to receive the 2015 Greenwich Quality Leader designation in Overall US Investment Consulting for large consulting firms.

***On behalf of the entire Summit team, thank you for your continued support.***

"What's most encouraging to us is that results like this reinforce the structure we created 21 years ago: to always put the client first," said Steve Holmes, Summit President. "We remain independent; the number of clients we serve has always focused on exclusivity and our most experienced professionals engage every day with clients seeking investment solutions. The need for honest, independent thinking has never been greater -- and Summit continues to meet that need."



"We are thrilled and humbled once again by our clients' candor, confidence, and willingness to share their positive feelings about Summit with an independent firm like Greenwich," says Chris Keller, Summit's Principal, Research. "We don't solicit, pay, or coax clients to participate, which makes this recognition especially gratifying. This is the first year Greenwich has publically recognized Quality Leaders in a Top 3 ranking. We've received similar client feedback and were ranked fourth or better in seven out of the last eight years. We love our clients and work very hard to ensure the feeling remains mutual."

***The survey results underscore the importance of client service and investment consulting capabilities – and reinforces our mission to appreciate and serve the unique goals and objectives of each of our clients.***

**SUMMARY OF 2015 GREENWICH QUALITY LEADER<sup>SM</sup> IN OVERALL US INVESTMENT CONSULTING RANKINGS OF 10 LARGEST CONSULTANTS: KEY SUCCESS FACTORS**

**The "Medal Count"**



***Summit not only placed in the Top 3 overall, we were in the Top 3 in 12 of the 14 categories -- the highest of any firm. Summit is the only firm that did not earn a relative rank in the bottom three in any category.***

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These surveys were conducted by Greenwich Associates, a third-party research firm that is independent of Summit Strategies Group. Greenwich surveyed plan sponsors with assets in excess of \$150 million to document their opinions of their investment consulting relationships. Consultants like Summit receive the survey results in exchange for providing Greenwich with evaluations of investment managers. Summit did not pay Greenwich any compensation for inclusion in this study.

The 2015 survey is based on 1,341 interviews, 28 of whom retain Summit as their consultant. The 2014 survey is based on 1,277 interviews, 32 of whom retain Summit as their consultant. The 2013 survey is based on 1,093 interviews, 19 of whom retain Summit as their consultant. The 2012 survey is based on 970 interviews, 22 of whom retain Summit as their consultant. The 2011 survey is based on 987 interviews, 26 of whom retain Summit as their consultant. The 2010 survey is based on 1,000 interviews, 24 of whom retain Summit as their consultant. The 2009 survey is based on 1,009 interviews, 21 of whom retain Summit as their consultant. The 2008 survey is based on 1,075 interviews, 20 of whom retain Summit as their consultant. For more information regarding the methodology of the 2015 survey, please click the following hyperlink: <https://www.greenwich.com/asset-management/leading-investment-consultants-form-deep-advisory-relationships>.

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