

# PERFORMANCE MEASUREMENT

3Q 2013



*Summit Strategies Group*

Access to performance data is critical for effective decision-making and long-range planning. As a client, you always want to know, “How are we doing?” Summit has an in-house Performance Measurement group responsible for creating and providing relevant tools that not only provide that answer, but leads to better decision-making overall.

## OUR PHILOSOPHY

An in-house Performance Measurement staff is a critical distinction that differentiates Summit from many of its competitors. Among the benefits:

- Daily performance is available via the Summit website
- Clients to have a direct relationship with the analysts who calculate results.
- Summit calculates time-weighted rates of return and generates results on a gross of fees, net of manager fees and net of all fees basis.
- All portfolios are aggregated into composites based on investment policy statement criteria.
- Summit regularly collects manager reported performance and reconciles material discrepancies.

## THERE ARE FOUR TYPES OF REPORTS available to clients from the Performance Measurement team

### Daily Performance

Clients have access to unaudited, daily performance via the Summit website.



### Monthly “Flash” Reports

Designed for clients to quickly ascertain the performance of their entire plan versus relevant benchmarks and policies



### Quarterly Performance Reviews

Accessible via the iPad or Internet Explorer, this interactive, drill down report offers a macro and micro view all with a click of the mouse, or touch of a finger.



### E-Reports

Accessible via the iPad or Internet Explorer, this interactive, drill down report offers a macro and micro view all with a click of the mouse, or touch of a finger.

