

Getting the Job Done:

Offering excellent client service in private markets

These three principles can help you deliver a seamless experience through the life of the investment.

1

Educate

Private market investors can choose between drawdown funds and perpetual funds. In both cases, patience and a long-term mindset are essential.

Actionable Insights

- Practice a concise explanation of both fund types.
- Lead with benefits, then outline trade-offs to set balanced expectations.
- Use a simple visual or chart to show how capital is deployed over time.

2

Support

Allocating to private markets is more involved than buying a stock or bond. Partnering with skilled managers provides access to proven infrastructure and dedicated teams.

Actionable Insights

- Map out the allocation process step-by-step for clients.
- Introduce the client to the manager's investor services team early to build comfort.
- Leverage your relationship with the manager to set expectations before committing capital.

3

Communicate

Use plain language and straightforward materials. Share educational resources and market insights, so clients understand how their capital is being put to work.

Actionable Insights

- Maintain a consistent update schedule, so clients know what to expect.
- Keep a "resource library" ready – brochures, FAQs, and market insights.
- Use the simplest possible language, even for complex topics.

Next steps

Our tailored checklist, on the reverse of this page, can help you get started.



Private markets client service checklist

Use this checklist to help you deliver excellent client service.

Educate

Make the options clear



Define

Deliver a streamlined explanation of drawdown vs. perpetual funds.

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Balance

Lead with benefits, then outline trade-offs.

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Demonstrate

Use a simple visual to show capital deployment timelines.

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Inform

Set expectations on liquidity and holding periods early.

☐

Support

Streamline the process



Show

Map out the allocation process step-by-step for the client.

☐

Meet

Introduce the client to the service team before allocation.

☐

Check

Confirm service provider quality and responsiveness.

☐

Delegate

Leverage manager resources for onboarding and administration.

☐

Private markets client service checklist

Use this checklist to help you deliver excellent client service.

Communicate

Keep it simple and consistent



Maintain

Maintain a regular update schedule.

☐

Share

Share educational materials and market insights.

☐

Prepare

Keep a ready-to-send resource library.

☐

Simplify

Use plain language for all client communications.

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Notes

Important disclosure information

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