

due dil·i·gence

reasonable steps taken by a person in order to satisfy a legal requirement, especially in buying or selling something.

Due Diligence Works: this is what we perfect.

Core Services

- **Governance and Product Committee Review** - think product committee in a box
- **Due Diligence and Product Shelf Management Regulatory Preparation**
- **Proactive Due Diligence** - It's always on due diligence and includes Carrier DDQ's
- **Identify Product Shelf Gaps and recommend add/keep/replace guidance regularly**
- **Score ALL Packaged Products with Quantitative AND Qualitative Research**
- **Advisor training on product positioning**

Comprehensive Services

Technology

Product Research Portal for home and Advisors - Your firms primary research portal. Elegant in design and built to be easy to compare products across all product types.

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ERISA Wizard - Rollovers in minutes, built for speed and accuracy with fee comparison and best interest documentation in minutes solving for PTE 2020-02.

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REG BI Wizard - Regulation Best Interest documentation in minutes with one click reasonably available alternatives across ALL product types. Only DDW does this today.

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70 Institutional Clients



200 Reg and Product Committees a Year



125 Years Experience

Products Covered

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- Mutual Funds
- Exchange Traded Funds
- Unit Investment Trusts
- Structured Products
- Alternative Investments
- Separately Managed Account
- Fund Strategist Portfolios



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