

# Consultant Search Services



## Why RFP?

- 1 Fees
- 2 Explore OCIO
- 3 Asset growth
- 4 Competition
- 5 Performance
- 6 Fresh ideas
- 7 New services
- 8 Relationship change
- 9 Alternatives expertise

## When was the last time you reviewed your consultant?

Running an RFP is painful and firm differences can be subtle.

But **periodic review** of these relationships is beneficial.

Let us help your organization evaluate this **key relationship**.

## Overview of The Alpha Search Process (3-4 months)



Target: 3 to 4 weeks

**Develop** criteria specific to your organization's needs

**Design** RFP to isolate key criteria for firm evaluation

**Identify** appropriate candidates and deliver RFP

6 to 8 weeks

**Analyze** responses from RFP candidates across key dimensions based on custom RFP criteria

**Evaluate** and select finalists using this in depth analysis

2 to 3 weeks

**Coordinate** and run finals presentations with chosen candidates

**Recommend** the top candidate for approval

**Select** a new consultant

## The Alpha Capital Advantage

Experience at endowments and consulting firms

Certified professionals

>5 decades of cumulative experience

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## Meet Our Team



Brad Alford, CFA,  
Principal

### **Bradley H. Alford, CFA** **Principal**

Brad founded Alpha Capital Management in July 2006 and serves as the Chief Investment Officer. He has nearly thirty years of investment management experience. Brad works with institutions to execute short-term projects to evaluate investment consulting and OCIO service providers.

Prior to founding Alpha Capital in July 2006, he was a Managing Director at Atlantic Trust from 2002 to 2006, where he worked directly with some of the firm's largest clients. From 2000 to 2002, Brad served as the Director of Investment Advisory Services at MyCFO, a firm focused on managing assets for ultra-high-net-worth clients. From 1995 to 2000, Brad was the Managing Director of the investment division for the \$2 billion Duke Endowment. At Duke, he expanded the alternative asset portfolio from \$100 million to more than \$1 billion. From 1989 to 1995, Brad was the Director of Endowment Investments for the Emory University Endowment with assets in excess of \$4 billion.

Brad also founded and built an internet company, IPO Lockup.com. IPO Lockup.com was the first website to track and analyze the effects of lockup expirations on initial public offerings (IPOs). The website's information was featured each Sunday in the New York Times, and CNBC named IPO Lockup.com one of the "Cool Websites" for 1999. Brad sold the company in 2000.

He has been quoted extensively in the financial press, including the Wall Street Journal, Barron's, Fortune, and the New York Times. He has also made multiple appearances on CNBC, Bloomberg TV, and Fox Business Network.

He holds a BS in Corporate Finance and an MBA from the University of Alabama. In addition, he also completed the intensive Senior Investment Manager Program at Princeton University and holds the Chartered Financial Analyst (CFA) designation.

### **Anna Dunn Tabke, CFA, CAIA** **Principal**

Anna joined Alpha Capital Management in 2012 and serves as a Principal of the firm. She has more than ten years of investment experience. She matches institutions with investment consultants or OCIO service providers to build strong, long-term relationships.

Prior to joining Alpha Capital Management, Anna was an institutional investment consultant with Mercer, where she partnered with senior consultants to provide a full range of investment consulting services to institutional clients. She developed intellectual capital on investment opportunities in addition to portfolio structuring, asset allocation modeling, and investment manager analysis for client portfolios. Anna began her career as an investment consultant at Rogerscasey (now Segal Marco).

Anna holds a BA in Economics from Princeton University. She is a CFA charterholder and is a member of the CFA Institute and the CFA Society of Atlanta. She is also a CAIA (Chartered Alternative Investment Analyst) charterholder and a member of the CAIA Association as well as a founding Chapter Executive for the CAIA Atlanta Chapter.



Anna Dunn Tabke,  
CFA, CAIA, Principal

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