

Business Development and Deal Sourcing

Identifying Prospective
Investors

April 2024



Identifying Prospective Investors

TresVista created a list of high potential LP prospects as a part of the fundraising efforts for a client

Request Overview

- To create a list of potential LPs who might be interested in taking meetings at an upcoming conference as a part of the fundraising efforts for their upcoming fund
- The client provided a list of conference attendees comprised of single, multi-family offices, and RIAs and another list of competitors for both PE and Credit

Final Deliverable and Value Add

- The team started by identifying all the LPs and categorizing them by type such as Single/Multi-Family Offices, RIAs, Pension Funds, Endowment Funds etc.
- The team deep-dived into the LPs to determine their allocation to private equity/ private credit. The team used various sources including Preqin, company websites and news articles
- LPs who have allocated to the client’s competing firms or are considering allocation to the private equity and private credit asset classes in general were also identified using Preqin
- Cross referenced LP profiles against GP to be certain about the output

Output Snapshot



Snapshot				
ASSET CLASS	INVESTING	NEXT 12 MONTHS	TICKET SIZE (MN)	CURRENT TARGET ALLOCATION (MN)
Private Equity	Considering	-	-	-
Real Estate	No	-	-	-
Hedge Funds	Yes	-	-	-
Infrastructure	No	-	-	-
Private Debt	No	-	-	-
Natural Resources	No	-	-	-



Investors					
INVESTOR	NO. OF FUNDS	TYPE	CITY	COUNTRY	ASSET CLASS
Aegon Companies Pension Plan	2	Private Sector Pension Fund	The Hague	Netherlands	PE
Alameda County Employees' Retirement Association	2	Public Pension Fund	Oakland	US	PE
Alaska Permanent Fund Corporation	5	Sovereign Wealth Fund	Juneau	US	PD
Albuquerque Community Foundation	2	Foundation	Albuquerque	US	PE



Final Output						
COMPANY	PE EXPOSURE?	PC EXPOSURE?	PLANNED PE ALLOCATION?	PLANNED PC ALLOCATION?	ALLOCATION TO COMPETITORS	COMPETITORS ALLOCATED
Brown Advisory	Yes	Yes	Yes	Yes	Yes	Crescent, Riverstone
Partners Group	Yes	Yes	Yes	Yes	Yes	Levine Leichtman, Wind Point, Bertram, and Apollo
Highlander Partners	Yes	Yes	Yes	Yes	No	No
MSF Capital Advisors	Yes	Yes	Yes	Yes	No	No

The background features a dark blue field with two large, overlapping geometric shapes. On the left, a light blue shape points downwards. On the right, an orange shape points upwards. The two shapes meet at a central point, creating a V-shape.

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