

Need Help Navigating?

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## Mutual Fund Research Sets Morgan Keegan Apart



Your Morgan Keegan financial advisor has just recommended that you add a certain mutual fund to your portfolio to strengthen your assets and increase the diversity and stability of your holdings. But how do you know that the mutual fund your advisor is offering is best for you? The answer: Morgan Keegan's exceptional due diligence. At Morgan Keegan, mutual funds are subject to one of the most detailed, thorough and exhaustive due diligence processes in the industry. It is just another example of how Morgan Keegan puts the interests of our clients before everything else.

With all the mutual funds out there, it is important to feel secure in knowing you have the right mix in your portfolio. Morgan Keegan understands, and that is why we offer a group of around 115 mutual funds that must meet the criteria of our exhaustive due diligence process. Our investment experts have devised a research and analysis process designed to identify those mutual funds that present the best potential for future returns. Most full-service investment firms have a process that focuses on raw data from past performances to select mutual funds for their clients. Morgan Keegan goes beyond that to look deep inside not only the funds, but the fund companies and managers who offer them.

"We go beyond the past performance records provided by services like Morningstar," explains Gary Stringer, Director of Investments, Wealth Management Services at Morgan Keegan. "We are not so much concerned with what funds have done in the past, but with what they will do for us in the future. And the best way to do that is to really get to know the people managing the funds and learn as much as we can about how they intend to earn our clients money."