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- **Year launched firm:** 2017
- **Investor channels covered today:** All asset classes, asset managers/GPs and allocators
- **Firm prior to launching current business:** PSP Investments

1 Why did you decide to launch your business?

When I started to look at ESG issues around 2015, I realized first how material these factors could be for an investment process (basically proxying the intangibles of a firm) and I recognized second the huge knowledge gap there was in the investment industry on ESG. By 2017, I was convinced this would be the next paradigm shift in the investment industry with every investment manager building internal ESG teams and integrating ESG factors within their strategies. I decided to leave my then current position in the public markets group at PSP to start an advisory practice working with investors to integrate ESG within investment processes. While it has taken a while, the market is getting there and CGC now has offices in Montreal, Toronto and London (UK).

2 Any specific success story that stands out?

At CGC we are only successful if our clients are successful. One particular success story is of one of our clients, a private credit manager, who was at a very initiated level of ESG maturity but wanted to increase maturity to align to market best practices for their strategies. We did an assessment of their current state ESG practices, both within their investment strategies and at the firm level. We then designed a target state model and implementation plan for them to achieve their desired positioning for ESG integration. The firm created cross departmental teams to execute on the plan and over the course of 18 months implemented the majority of our recommendations. We recently re-assessed their ESG practices. Not only did their level of ESG maturity increase significantly, but the firm's internal culture was also positively impacted. Their resources, many of whom would not normally interact with each other day to day, came together as one team to accomplish a shared goal. They have since won multiple allocations partly because of their ESG work.

3 What are your 3 – 5 year goals for your business as you look ahead?

Part of our success is that we can be agile and adapt to the market's needs. In addition to the strategic ESG advisory work we do, we have also started to do more tactical transaction due diligence and provide outsourced ESG team capabilities for firms that are looking for additional capacity to implement their strategy. We have also started to use our proprietary tools to perform ESG due diligence on managers for LPs. In 3-5 years, we expect to grow and add expertise by building out our teams in Canada, the US and the UK, and to be the leading boutique ESG advisory and due diligence firm for financial markets.

4 How has being an AIMA member benefitted your firm's growth journey?

At CGC, we have developed a comprehensive ESG assessment methodology for managers that want to know where they sit against industry best practices, and how they would score on ESG due diligence from an allocator. Being part of AIMA has allowed us to get in front of a large section of the global credit managers and hedge funds to be able to scale this due diligence assessment and create comprehensive benchmarks.