

## Database Guide

# Directory of Alternative Investment Programs

### Introduction

Directory of Alternative Investment Programs (AIP Directory) on CD ROM contains detailed profiles of active investors' firms, their advisors, and placement agents.


### Scope

- US and global institutions
- Includes over 1,000 profiles of investment firms, advisors, and placement agents firms

### Access

Available at Jackson Library Workstation 26. Log on to the computer using:

User name: **bridge**  
Password: **jackbridge**  
Domain: **SU-GSB**

Click the  icon on the desktop.

### Help

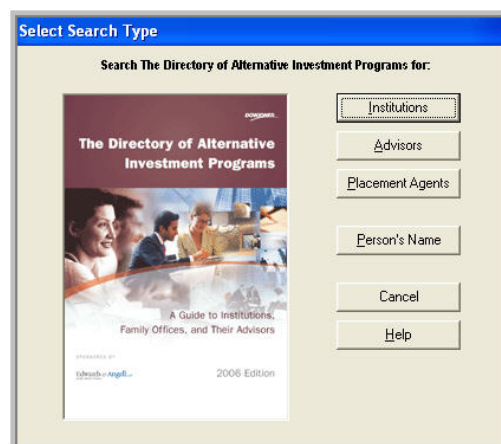
- Click on **Help** from the top menu bar on any page
- For search assistance, ask a librarian at the Information Desk or email to [Jackson-infodesk@gsb.stanford.edu](mailto:Jackson-infodesk@gsb.stanford.edu)
- For technical problems, email to [rcc-action@gsb.stanford.edu](mailto:rcc-action@gsb.stanford.edu)

### Features

- Flexible search options including screening by investment criteria
- Detailed firms' profiles including links to the institutions' web sites and direct links to key personnel emails
- Tools for downloading persons' records into Excel
- Yearly updates

### Searching Directory of Alternative Investment Programs

Upon the first login into the database, you can select a type of search from the window shown below. You can bring up the same window at any time during your search session by selecting from the top menu: **Search > Select Search Type** or, you can select the search type directly from the **Search** menu.

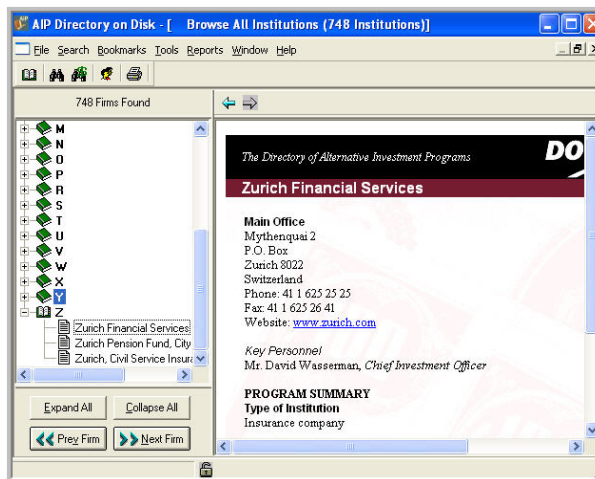


Select from the following search types:

- **Searching by Institutions:** The Directory includes five main types of institutional investors: public pension funds, corporate pension funds, endowments, foundations, insurance companies, and banks/commercial finance companies. Available search options are:
  - Browse All Institutions
  - Search by Institution Name
  - Search by Investment Criteria
- **Searching by Advisors:** The Directory includes profiles of specialized advisors (specialized firms that assist institutional investors in a variety of ways in the alternative investment market), including the services they offer. Available search options are:
  - Browse All Advisors
  - Search by Advisor Name
- **Searching by Placement Agents:** The Directory includes profiles of placement agents (firms that assist private equity fund raisers in contacting institutional investors and planning marketing strategies), including the services they offer. Available search options are:
  - Browse All Placement Agents
  - Search by Placement Agent Name
- **Searching by Person's Name**

## Browsing

Browse the entire directory listing of Institutions, Advisors, or Placement Agents listed alphabetically.



1. Select your search type and then select one of the browse searches: **All Institutions**, **All Advisors**, or **All Placement Agents**. A screen similar to the one shown above will appear with the matching firms arranged alphabetically in the expandable menu in the left window.
2. Click the book icon in front of a letter or click the **Expand All/Collapse All** button to open or close all books at once.
3. Click the firm's name in the expandable menu in the left window and view the firm's profile in the right window.

## Searching by name

Find an individual firm or create a list of firms which names match your search term.



1. Select your search type and then select one of the name searches: **Institution Name**, **Advisor Name**, or **Placement Agent Name**. A search text box as shown above will appear.
2. Enter a name or a part of the firm's name in the Search box.
3. Click **Search**.



To view results:

1. Click the book icon in front of a letter or click the **Expand All/Collapse All** button to open or close all books at once.
2. Click the firm's or person's name in the expandable menu in the left window and view the firm's or person's profile in the right window.

## Creating reports

With the search results displayed, click **Report** on the top menu bar. You can select the following display formats:

- **Quick list** – alphabetical listing of firms from the results window
- **Rankings** – list of firms from the results window ranked by **Total Assets**, **Allocation to Alternatives**, or **Commitments to Alternatives**

**NOTE:** The Report option is not available with **Person's Name** type of search.

## Searching Tips:

- Search terms are not case-sensitive.
- Screen Advisors or Placement Agents firms by selecting these categories in **Institution Type** box when searching by Investment Criteria.
- Save your search criteria for future reference by selecting **Search > Save Search** on the top menu.
- Combine a number of firms for future reference by using a **Bookmark** feature. To create a bookmark, do the following:
  1. Select **Bookmarks > Edit Bookmarks** from the top menu bar.
  2. In the **Edit Bookmarks** dialog box, click the **New Bookmark** and assign your bookmark a name.
  3. In the Search results left window, right-click on the firm's name and select **Bookmarks > Add To** then select one of your bookmarks name.

## Sample Searches

*Find institutions on the West Coast that are investing in LBO funds with commitment amount from \$10 million or more*

1. Select **Institutions > Investment Criteria**.
2. Under the **Investor**, select **California, Oregon, and Washington** in the **State** box.
3. Click the **Portfolio Review** in the **Institutional Status** box, select **Actively building portfolio, Mature recycling distributions, and Recently established programs**.
4. Click the **Program Summary** in the **Assets of Interest** box, select **Buyouts/Corporate Finance** in the **Partnership Investment Sought** box, and enter **10**.
5. Click **Search** and view results.

*Find institutions currently investing in Hedge Funds*

1. Select **Institutions > Investment Criteria**.
2. Click the **Portfolio Review** in the **Institutional Status** box, select all applicable choices, e.g. **Actively building portfolio, Mature recycling distributions, Recently established programs** etc.
3. Click the **Program Summary** in the **Assets of Interest** box, and select **Hedge Funds**.
4. Click **Search** and view results.

## Printing/Downloading

To print, select **File > Print** or click the **Print** icon on the top menu bar.

- To print a report or person's profile, issue the **Print** command.
- To print institutions' profiles:
  1. Issue the **Print** command.
  2. In the dialog box, make a selection to print a currently displayed profile or all profiles in the search results window. Click **OK**.

**NOTE:** Each institution profile takes 2-3 print pages.
- To download persons' records into Excel:
  1. With results for firms search in the left Search Results window, click **Tools > Export Persons** on the top menu bar.
  2. Make your selections in the **Export Options** dialog box. Click **OK**.
- To export individual firm's profile into Excel, on the right Profile screen, right-click the mouse and select **Export to Microsoft Excel**.