

VIDEO

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Focus on Funds: Current Trends Facing Investment Officers

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In the August 22, 2014, edition of *Focus on Funds*, noted industry consultant John Casey outlines the major challenges facing chief investment officers.

Transcript

Stephanie Ortals-Tibbs, ICI Director, Media Relations: Welcome to *Focus on Funds*, the Investment Company Institute's weekly roundup of industry news, ICI activities, and research findings.

What is top of mind for some of the industry's chief investment officers? I spoke with leading industry consultant John Casey about that issue following his moderation of the ICI General Membership Meeting panel on investing insights. Here's what he told me.

John Casey, Chairman, Casey, Quirk & Associates: When you're in the role of a chief investment officer, you have to deal with complexity. And that can be regulatory complexity, it can be, certainly, the ongoing investing complexity, new ideas, new markets to serve. All of these firms obviously are substantially global organizations, and managing a diverse set of circumstances on a global basis is really easy on paper, but it's really tough to oversee.

Stephanie Ortals-Tibbs: Can we also talk about the repeated use of the word *outcomes*?

John Casey: Yes, it's an evolving concept of looking at the clients that you're serving first and then backing up to another popular word, *solution*, so they can have that outcome. And one of the points that we all agree with—and a chief investment officer would spend time on this—is longevity.

And a key thing about outcomes is the education process. And that's where technology hopefully will be a great tool.

Stephanie Ortals-Tibbs: That's this week in funds. See you next week.

Additional Resources

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- [ICI Viewpoints: Industry Leaders Address Evolving Industry Challenges and Opportunities](#)

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