

Financial Services & Research Analysts**WHAT YOU NEED TO KNOW:**

This section includes firms that manage investments in market securities and/or invest in HRO provider firms. Analysts from these firms write reports that reflect stock and valuation trends within the industry.

COMPANY	URL	OTHER SERVICES
Accretive Technology Partners, LLC	www.accretivetechology.com	
Advent International Corporation	www.adventinternational.com	
Bank of America Securities LLC	www.bofasecurities.com	
Brean Capital, LLC	www.breancapital.com	
De Bellas & Co.	www.debellas.com	
Deutsche Bank Alex Brown	dbconnect2.netxselect.com	
Everest Research Group	www.research.everestgrp.com	IT
First Analysis Securities Corp.	www.firstanalysis.com	
Frontenac Company	www.frontenac.com	
Green Retirement Plans	www.greenretirementplans.com	
GTCR Golder Rauner, LLC	www.gtcr.com	IT, HB
GulfStar Group	www.gulfstargroup.com	
IDC	www.idc.com	IT
Janney	www.janney.com	
JP Morgan Securities	www.jpmorgan.com	
Lake Capital	www.lakecapital.com	
Legg Mason, Inc.	www.leggmason.com	WEL
Merrill Lynch & Co., Inc.	www.ml.com	
Morgan Stanley	www.morganstanley.com	
Odyssey Investment Partners, LLC	www.odysseyinvestment.com	
Pacific Crest Securities	www.pacific-crest.com	
Raymond James Financial, Inc.	www.raymondjames.com	WEL
Robert W. Baird & Co. Incorporated	www.rwbaird.com	
Rudder Capital LLC	www.ruddercapital.com	
Saratoga Institute	www.pwc.com/saratoga	T&D
SunTrust Robinson Humphrey	www.suntrustrh.com	
Technology Holdings	www.technologyholdings.net	
The Yankee Group	www.yankeegroup.com	
Thomas Weisel Partners	www.tweisel.com	WEL
UBS Investment Bank	www.ubs.com	
US Bancorp Piper Jaffray	www.piperjaffray.com	
William Blair & Company, LLC	www.wmblair.com	WEL