

PHOENIX AMERICAN RELEASES WHITE PAPER ON OPERATIONAL AND STRATEGIC CONSIDERATIONS FOR INVESTMENT FUND MANAGERS IN UNCERTAIN ECONOMIC TIMES

Report Provides Insights and Data on Interest Rates, Consumer Sentiment and Investor Perspective

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SAN RAFAEL, CA, Phoenix American, a full-service [fund administration](#) provider for alternative investment funds, has published a new white paper examining the current state the economy and key considerations for alternative fund managers. [Fund Operations and Strategy in Uncertain Economic Times](#) analyses the current inflationary and rising interest rate environment in the US economy and the outlook for alternative investment fund managers in 2022 and beyond.

The paper draws on Phoenix American's perspective as an administration provider for real estate funds and features contributions from FactRight, a leading provider of due diligence on sponsors and products in the alternative investment industry.

Ambiguous Consumer and Investor Sentiment

Top takeaways from the report include:

- **Conflicting outlook of consumers.** Data shows that Americans have a stronger view of the state of the overall economy and outlook for business than for their personal economic prospects.
- **Higher but not high interest rates.** The Federal Reserve has taken alarmingly fast and aggressive action on interest rates but they remain well below their long-term average.
- **Operational considerations for fund managers.** Fund sponsors can guard against the effects of economic fluctuations with lean back-office efficiency and the elimination of key-person risk.

- **Strategic review.** Fund managers should take the opportunity to examine any assumptions of their fund strategy that may expose performance to volatility risk from key economic indicators.

50 Years of Fund Administration for Alternative Investments

Phoenix American has supported the back office needs of alternative funds since 1972, through times of both economic expansion and upheaval. The company's systems and services enable real estate and other alternative fund sponsors to respond operationally to major changes in strategy with innovative and flexible solutions. New approaches to fund raising, cash flow and deal acquisition employed by Phoenix American client funds are supported by a versatile and robust back-office infrastructure.

"Inflation and high interest rates are a challenge for investment funds, no doubt," said Andrew Constantin, Chief Operating Officer for Phoenix American. "But some are definitely better prepared than others, strategically and operationally, for sudden changes in market conditions."

About Phoenix American

Phoenix American Financial Services provides full-service fund administration, [fund accounting](#), [transfer agent and investor services](#) as well as sales and marketing reporting to fund sponsors in the alternative investment industry. The Phoenix American Aviation ABS group provides managing agent and accounting services for securitizations specializing in the commercial aviation leasing industry. The company is a subsidiary of Phoenix American Incorporated along with Phoenix American SalesFocus Solutions. Phoenix American was founded in 1972 and is headquartered in San Rafael, CA.

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