

## Case Development and Client Advisory Services

Legislative and judicial developments over the past three decades have established that institutional funds, the major stakeholders in U.S. public companies, have a duty to recover losses resulting from securities fraud and other forms of corporate misconduct. Institutional investors are expected to have procedures and policies in place to monitor securities and other shareholder actions in which they have a financial interest and viable claims.

Furthermore, ongoing changes in law and policy can make it challenging for institutional leaders to keep pace with their legal and ethical obligations as fiduciaries. Effective governance, thoughtful policies, and sound operations are critical for navigating judicial, regulatory, and legislative developments while safeguarding the long-term value of their investment portfolios.

BLB&G's Case Development and Client Advisory Group is dedicated to helping clients fulfill these fiduciary obligations. We offer a comprehensive suite of services, tailored to each client's specific needs and portfolios—at no cost to our clients:

- **Portfolio monitoring and case evaluation services** to help clients identify and track losses caused by securities fraud and corporate misconduct, and evaluate claims arising from those losses. Our team of specialized attorneys, financial analysts, and private investigators leverage our proprietary portfolio monitoring system, PortfolioWatch, to review holdings and analyze and calculate losses.
- **Global securities and litigation monitoring services** to ensure clients are informed about shareholder actions worldwide. We have decades of experience advising clients on global actions and leverage the expertise of our on-the-ground team in Canada and Europe to stay current on international litigation developments.
- **Fiduciary and governance advisory services** to address legal concerns unique to institutional investors. Several of our attorneys and advisors have prior institutional leadership experience, bringing deep expertise in organizational governance and operations, board policies and practices, and risk management.

[Meet the team](#) and [contact us](#) to learn how BLB&G can help you protect the financial interests of your beneficiaries.