

Saratoga Research & Investment Management

\$2B+ Assets Under Management

1995 Year Founded

23 Employees



Overview

About Saratoga Research & Investment Management

Saratoga Research & Investment Management is an SEC Registered Investment Advisor specializing in the construction and management of equity portfolios composed of high caliber businesses utilizing common sense investment principles.

Their investment process is designed to meet the long-term needs of conservative individual and institutional investors. Founded in 1995, the firm manages approximately \$2.6 billion* in separately managed accounts for high-net-worth individuals, retirement accounts, trusts, endowments and foundations across the United States. We also oversee investment models on model delivery platforms across the United States and Canada with roughly \$2.9 billion in assets under advisement.**

*Total firm SMA AUM as of 12/31/2022: \$2,603,780,552.47 **Approximate firm model delivery AUA as of 12/31/2022: \$2,934,214,689

Saratoga Research & Investment Management + Dakota

Prior to getting access to Marketplace, we were somewhat operating in the dark with respect to potential prospects and, more importantly, contacts. Marketplace has made our marketing efforts and trips far more efficient and effective. We have also used the manager search information to submit RFPs for searches that we may not have been aware of had it not been for Marketplace.

What were you looking for in a data provider?

Saratoga came to Dakota not knowing the full scope of their data needs, just that they needed something to fill in the gaps. They've found the prospect and contact data, the metro area reviews, and Dakota Cocktails events tremendously helpful since getting started with Dakota Marketplace.

What problems did Marketplace help you overcome?

Saratoga has had the most success by using Marketplace data to identify the appropriate contacts (and contact information) at prospective firms.

Why was Marketplace the solution?

Marketplace helped fill the gap within Saratoga's data, and the team can't imagine any other organization doing a better job.

What benefits and/or growth have you seen because of Dakota Marketplace?

Dakota Marketplace has helped the Saratoga team close some new business and lead to the start of numerous dialogues. For new and existing relationships, they've also been more efficient and confident in their marketing efforts.