

# Profiles of Success

## “First Coverage demonstrates value-add and relevancy of ideas to buy-side clients”

Portfolio managers receive countless pitches from institutional sales representatives, brokers and analysts every day. Sorting and evaluating the information can be daunting, and unfortunately, it's all too easy for valuable ideas to go unnoticed. The First Coverage platform captures important details of sell-side relationships and provides a wealth of statistics to help the buy-side better understand the value being provided.

“The First Coverage platform shows the relevance of my ideas to clients. It's a good way for the buy-side to filter ideas and see who consistently provides the best information,” said Jason Baibokas, managing director of Institutional Equities, Thomas Weisel Partners, who appreciates that the buy-side can evaluate his performance but not see his intellectual property.

The First Coverage platform allows buy-side clients to gather, organize and evaluate ideas quickly and easily, to cut through the noise and cull only relevant information, whether it's derived for an existing relationship or a new sell-side source. The system's reporting function makes it easy to identify who has provided the most productive meetings and greatest returns. This can allow for faster payment of the sell-side – something that Baibokas also appreciates.

An active user of the platform, Baibokas has been compensated for the ideas he's entered into the First Coverage platform, knows that his research is protected and believes there's little risk for the sell-side in participating.

“Give it a try. It's low risk, with the potential for high results,” Baibokas tells sell-side colleagues who may be worried about sharing their ideas broadly. “It's a great way to interface with the client and demonstrate your value.”

Everything needed by both sides of the street is stored in the First Coverage platform – current research PDFs, important investment ideas, past and upcoming sell-side meetings, and more. And data is organized based on buy-side criteria and assigned visual indicators, so it's easy to see at a glance who provides the most useful information in any category.

*“I was an early adopter of the First Coverage platform and like it because it provides evidence that my ideas add value to my clients. I highly recommend the system.”*

Jason Baibokas, Managing Director, Institutional Equities, Thomas Weisel Partners



**Thomas Weisel Partners**  
Experts in Growth



**Company Overview:**  
Thomas Weisel Partners Group, Inc. is an investment bank, founded in 1998, focused primarily on the growth sectors of the economy. Thomas Weisel Partners Group, Inc. generates revenues from three principal sources: investment banking, brokerage and asset management.

**Coverage:**  
Growth sectors of global economy, with deep domain expertise in Consumer, Energy, Financial Services, Healthcare, Internet, Media & Telecom, Metals & Mining, and Technology

**About Jason Baibokas, CFA:**  
Jason Baibokas is Managing Director, Institutional Equities at Thomas Weisel Partners, a U.S. listed investment bank focusing on growth equities. In late 2007, Westwind Partners, the company he worked with was purchased by Thomas Weisel Partners to create one of North America's premier investment boutiques. Prior to joining Westwind, in 2005, Baibokas held various senior roles in derivatives, structured products and hedge fund sales management at Merrill Lynch and TD Financial Group. He holds an MBA from the Rotman School of Management and is a CFA charter holder. Baibokas has been a member of the UFSC Toronto Chapter since 2001, where he participated in a number of community and professional development events such as Junior Achievement and the Mentoring Program.



To learn more about the First Coverage platform, visit [FirstCoverage.com](http://FirstCoverage.com), e-mail [info@FirstCoverage.com](mailto:info@FirstCoverage.com), or call USA: 617-303-0180 or Canada 416-922-0941.