

NEWS

For Immediate Release

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America’s Best TAMPs, 2021 Edition: New Guide for Financial Professionals Unveiled by TheWealthAdvisor.com

*Digital Dashboard Feature Provides More Responsive List;
Orion Advisor Solutions voted #1 TAMP*

Santa Monica, Calif. (February 4, 2021) – [TheWealthAdvisor.com](https://www.thewealthadvisor.com), a Marina Media, LLC outlet, today announced their annual issue of “America’s Best TAMPs – 2021 Edition,” which features thirty of the top TAMPs in the U.S.A. TAMP or turnkey asset management program is typically a fee-account technology platform that advisors, broker/dealers, insurance companies, banks, law firms, and CPA firms can use to help oversee and optimize the return of their clients’ investments.

“This 70-page complimentary guide presents the winner’s list — 30 TAMP solution providers who represent nearly \$2 trillion in managed wealth. They offer services to financial advisory firms around the country. Providers include well known names like Orion, Envestnet, AssetMark, and SEI — all public companies – and now Morningstar joins the list,” said Scott Martin, Editor-in-Chief, America’s Best TAMPs.

America’s Best TAMPs – 2021 Edition presents the following information:

- Why (despite increased competition) the TAMP landscape is as wide open as ever
- How to navigate the “robot revolution” and become a lucrative hybrid
- 24 unique advantages the right TAMP can offer advisors and their firms
- The different types of “fee models” and how to select the right one

- The pros and cons of building client portfolios from outside models
- The quickest way to get started as a TAMP or add TAMP capabilities

TOP RANKING TAMPs LEAD THE WAY

“Orion, Envestnet and Morningstar ranked among the leading TAMPs in America according to the new report issued by TheWealthAdvisor.com. TAMPs offer advisors outsourced alternatives to investment management. Cost savings and access to the best and brightest managers in the business are the reasons this marketplaces has grown to to \$2 trillion under management,” said Martin.

“Some of these models are truly breathtaking in their ability to raise the efficient frontier, but they get lost on the infinite shelf, buried in the sheer diversity of niche strategies available as well as the endless index copycats,” said Martin. “We want to make sure advisors using these platforms don’t miss the real innovators available, especially when so many of them outperformed everything else around last year. If advisors want to give their clients differentiated outcomes and differentiate themselves in the process, I urge them to familiarize themselves with these new approaches to the classic portfolio. Each brings something different to the table.”

Orion Advisor Solutions was recognized by readers as the #1 TAMP of the year. “Outsourced asset management has never played a more vital role in the fiduciary future of our industry. In order to thrive as entrepreneurs and offer an outstanding client experience, advisors need individualized investment strategies in a tech-enabled framework that links to every step of the advisor-client journey. We're humbled by this recognition from The Wealth Advisor's readers,” said Eric Clarke, CEO, Orion Advisor Solutions.

Readers can download a complimentary copy of the America’s Best TAMPs guide here: <http://americasbesttamps.com>

INTRODUCING THE DIGITAL DASHBOARD

Readers can download not only the guide but can also access a Digital Dashboard that allows advisors to receive live updates on developments and announcements. “A once-a-year industry handbook is going to be obsolete almost the minute we publish it. In an accelerated world, advisors need to make sure they’re looking at the right numbers. That's why we've launched the [Digital Dashboard](#). It updates live whenever the listed companies need to signal new developments such as new strategies, new tools, a helpful blog post advisors might want to see, and so forth. The Dashboard also incorporates live contact links. Advisors can use the contact links to build relationships,” said Martin.

Readers can access Digital Dashboard here: <http://tamps.com>

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Since 2009, The Wealth Advisor has provided news, opinion, and education for wealth managers

and advisors alike. The outlet brings their readers the latest insights vital to their business, reducing the need to pour through dozens of news and industry publications. The Wealth Advisor is headquartered in Los Angeles, California with correspondents in LA, New York and beyond. The Wealth Advisor is part of Marina Media, LLC. Learn more at www.TheWealthAdvisor.com.

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