

# NEWS

FOR IMMEDIATE RELEASE

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## New “Playbook Portfolios” will Revolutionize How Financial Advisors Do Business

*First-of-kind solution, available exclusively on the Oranj platform, brings portfolios built by independent fiduciary strategists —with no overlay fees — to advisors focused on meeting client needs in challenging times*

**CHICAGO [October 29, 2020]** – [Oranj](#), a software platform that helps financial advisors streamline portfolio management and client service, today announced that Playbook Portfolios will launch in the coming weeks. This new program, the first of its kind in the financial services industry, will provide easy access to portfolios built by independent third-party strategists. [Playbook Portfolios](#), available exclusively on the Oranj platform, will revolutionize investment management for financial advisors. The program creates a bridge between independent strategists and asset managers to deliver diversification, expertise and independence to investing without increasing costs for advisors and their clients.

By bringing together independent strategists to build investment solutions from a diverse selection of asset manager funds and low-cost ETFs, Playbook Portfolios offers greater efficiency for advisors. In addition to diversity in investment selection for client portfolios, advisors have access to the expertise and insights of investment strategists on a single platform, and the confidence of independent, third party fiduciary portfolio construction. Plus, there are no overlay fees for the Playbook Portfolios program.

“Playbook Portfolios provides a strong value for advisors who are looking to access investment management expertise without increasing the cost of investing for clients,” said David Lyon, founder and CEO of Oranj. “Now more than ever, advisors have the opportunity to utilize innovative investment solutions to keep their firms efficient and to meet their clients’ needs. Investors need their advisors to help them navigate financial decisions in these uncertain times. By freeing up advisors to

spend more time with clients and less time constructing portfolios, Playbook Portfolios is designed to be an extension of the advisor’s team but without increased costs or overhead.”

“Playbook Portfolios is the first of its kind,” continued Lyon. “It is an important alternative for advisors compared to most turnkey asset management platforms and models currently in the marketplace. With other turnkey models, advisors may see some benefit but they will increase costs to their clients. Playbook Portfolios creates the best of both worlds to meet the needs of advisors and their clients.”

## HOW IT WORKS

**Asset Managers** - Industry-leading asset managers offer a diverse selection of funds and low-cost ETFs for inclusion in Playbook Portfolios

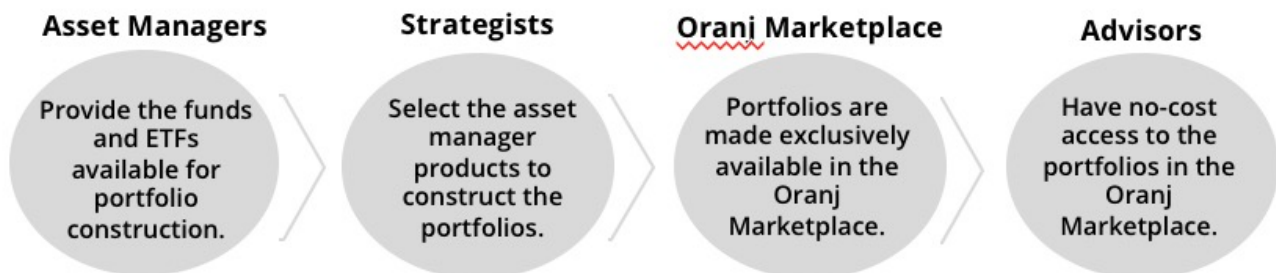
**Independent Strategists** – Working in a fiduciary capacity, independent third-party strategists build investment solutions from the available funds and ETFs

**Oranj Marketplace** – Playbook Portfolios are then added to the Oranj platform

**Independent Advisors** - Independent advisors gain no-cost access to Playbook Portfolios’ multi-manager investment solutions via the Oranj Marketplace

**Clients** – Enjoy more time with their advisor and fiduciary-built portfolios with no additional costs

## Playbook Portfolios: How it Works



## BEST-IN-CLASS SOLUTION

“We have teamed up with best-in-class strategists and asset managers in developing Playbook Portfolios and their participation has been enthusiastic,” stated Lyon. “The program is unique as it gives advisors access to portfolios constructed by leading strategists without increasing costs for the advisor or their clients.”

“After watching Oranj knock down barrier after barrier at fintech conferences and advisor-focused meetings, it was a pleasant surprise to be considered as an inaugural strategist on their multi-manager model platform,” said Benjamin M. Lavine, CIO at 3D Asset Management, one of the fiduciary strategists who has joined the program. “It has been an honor and a pleasure working with such a unique group of professionals. We are happy to support the Playbook Portfolio effort as well as the advisors who adopt the tool-set.”

“We are proud to partner with Oranj on the creation of their new Playbook Portfolios,” said Jason Schwarz, COO of Wilshire Associates, whose firm has joined the program as a fiduciary strategist. “As RIAs increasingly implement model portfolios, Wilshire is committed to helping financial advisors using the Oranj model marketplace by providing them with diversified models constructed from industry leading third party mutual funds and ETFs, with no additional overlay fee.”

“We are excited to partner with Oranj on their new Playbook Portfolios, and their continued innovation in the financial services industry,” said Andrew Swan, CEO of IDX. “As RIAs are increasingly utilizing model portfolios to provide more sophisticated solutions for their clients, IDX is committed to helping this effort by providing rules-based and tactical solutions through Oranj and, most importantly, at no additional cost to the RIA.”

“We at Value Line Funds are excited to participate in this new Oranj program that gives advisors and their clients access to expertly-built strategies while helping reduce the cost of investing,” said Thomas Sarkany, Director of Marketing of Value Line Funds. “This structure offers a unique way to showcase compelling fund stories as key elements within these new investment models.”

To learn more about Playbook Portfolios visit [playbookportfolios.com](http://playbookportfolios.com).

## **ABOUT ORANJ**

Oranj simplifies advisor technology without sacrificing sophistication or increasing costs, helping financial advisors spend less time managing and more time advising clients. The single platform streamlines portfolio management and client service, and provides advisors with rebalancing/trading, client/prospect management, portfolio management, and a client portal. For more information about Oranj and its free to low-cost wealth management platform, visit <http://www.runoranj.com>, connect with them on LinkedIn, or follow [@runoranjdotcom](https://twitter.com/runoranjdotcom) on Twitter.

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