

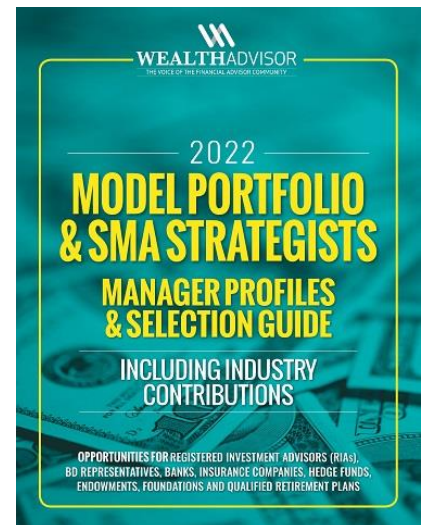
NEWS

For Immediate Release

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Enhanced Profiles Drive BlackRock, Invesco and Boutique Managers to The Wealth Advisor's New Model Portfolio Selection Guide

Segmenting “software-focused” strategist coverage from the TAMP platforms creates space for innovative portfolios to shine in the giants’ trillion-dollar shadow

Santa Monica, Calif. [October 22, 2021] – The Wealth Advisor, a Marina Media LLC publication, today announced the upcoming launch of the first *Model Portfolio & SMA Strategists: Manager Profiles & Selection Guide* (the Guide) and associated digital dashboard (the Dashboard), weekly industry news channel, and other media initiatives designed to spotlight innovative investment strategies that would otherwise get lost as turnkey asset management platforms (TAMPs) and model marketplaces proliferate.

BlackRock and Invesco have already joined numerous smaller asset management firms with profiles in the inaugural edition of the Guide, embracing the opportunity to help define the appeal of model-only investing for independent financial advisors and their clients.

“We’re thrilled to have the vote of implied support from trillion-dollar ETF sponsors, but the real story here is the evolution of the way investment ideas are delivered in today’s wealth management marketplace,” said Scott Martin, Wealth Advisor Editor-in-Chief. “The technology that supports outsourced client portfolios (the TAMP) took years to get traction among advisors who insisted that responsibility for picking securities was their core value proposition. Now that the TAMP approach finally has that traction, it’s time to shift focus from the ‘hardware’ to the

apps on the platform: the third-party models themselves.”

While typical TAMP menus provide entirely quantitative profiles of each investment model on the platform, the Guide will communicate directly with the advisors who ultimately are responsible for manager selection and monitoring. Each participating model provider will have space to build a narrative revolving around **what** its strategies accomplish, **how** advisors can incorporate them into their clients’ portfolios,, and why a differentiated approach adds value to client relationships strained by market volatility.

An early pilot program has already achieved significant gains in assets under management (AUM) for boutique asset management firms like Rareview Capital LLC, which attributes significant AUM gains to its profile in the Guide’s sister publication, *America’s Best TAMPs and TAMP Strategists*.

“We have a great story to tell,” said Neil Azous, Rareview founder and chief investment officer. “But in a world of lookalike investment solutions, you need a place to tell that story where it won’t simply get lost in a routine quantitative screen or buried in empty buzzwords. The Wealth Advisor gave us that place where advisors would hear our story, and it has translated into substantial asset flows in 2021.”

Martin agrees that the theoretically infinite open investment architecture of many TAMPs can impede advisors from discovering truly innovative solutions.

“If the TAMP is the hardware, space on the platform is practically unlimited,” Martin said. “Infinite choice tends to create paralysis, pushing many advisors back to vanilla index funds that perform decently but fail to deliver the kind of truly tailored client outcomes that next-generation strategists can provide: improved tax efficiency, smarter income streams, better risk-return profiles, and responsiveness to market conditions.”

“These factors simply don’t show up on the passive screen. You need a narrative to demonstrate how these strategies enhance the conventional efficient frontier,” said Martin. “That’s why we are showcasing a variety of SMA and model portfolio solutions via our PDF magazine and digital dashboard. Investment advisors and broker/dealers need help in the due diligence process.”

THE FUTURE OF INVESTING BEYOND ETFs

Using an easy-to-understand metaphor, Martin explains the new frontier like this: “TAMPs are the technological framework, the ‘hardware’ that delivers investment ideas. The strategies or models are the apps that advisors can select from the menu. With BlackRock Separately Managed Accounts, for example, advisors can create customized portfolios for their most complex clients and have more time to focus on what matters to them. Advisors could, alternatively, chose from a menu of Model Portfolios to help meet client goals or a menu of Managed Models should the advisor wish to have the provider handle the rebalancing using technology that automates portfolio trading and tax loss harvesting.”

THE NEXT FRONTIER: COST-EFFICIENCY WITH INFINITE PERSONALIZATION

According to The Wealth Advisor's internal research, the wealth management landscape has evolved from mutual funds through ETFs into structures that combine the best aspects of both worlds, giving end users pure access to the most sophisticated investment ideas.

As ETFs give way to the new category of model-only or model-native investing, the investment advisor can now deliver the best ideas in the world for practically nothing. Suddenly, fee compression is no longer so much of a challenge from the advisor's perspective because the cost of constructing and maintaining the portfolio becomes minimal.

"Just as ETFs are more efficient than conventional mutual funds, model-native investing is more efficient than the ETFs. This is the future," concluded Martin.

The first *Model Portfolio & SMA Strategists: Manager Profiles & Selection Guide* will be published on January 1, 2022. Asset managers interested in participating can get more information on criteria and reporting requirements at <https://lp.thewealthadvisor.com/MPSS-Deck-Request.html>.

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