

Sophisticated Investing, Made Simple

Model portfolios can save time and resources for advisors



Advisors are spending nearly **20% of their time**² on asset management activities, while juggling many other roles and responsibilities.

However, when investors are asked why they chose to work with an advisor, **investment performance (85) is much less important than factors like service, reputation, and relationship (57%)**³.

Outsourcing components of asset management by using model portfolios may free up time for advisors to focus on strengthening client relationships and growing their business.

There can be no assurance that these outcomes will be achieved. Diversification does not protect an investor from market risk and does not ensure a profit.

ADVISORS WHO USE THIRD PARTY MODELS¹

New clients per year

3.5x

Annual asset growth

2.0x

1) Source: FP Transitions "The Value of Time Quantifying How Client Focus Increases the Value of Your Business" April 2018 Advisor new client and asset growth statistics are compared to advisors who do not use third party models.

2) Source: Cerulli Associates. "U.S. Asset Allocation Model Portfolios 2020"

3) Source: Cerulli Associates. "U.S. Retail Investor Advice Relationships 2020"