

Outsourced research & model portfolio construction

REDUCE THE AMOUNT OF TIME SPENT ON CLIENT PORTFOLIOS AND CREATE MORE TIME FOR CLIENTS AND REFERRALS.

For those advisors interested in outsourcing the design of multi-class investment strategies, including the research and due diligence required for selecting investments for implementation, Tamarac AdvisorServices™ has partnered with firms who specialize in such. The result is pre-packaged, ready to use investment strategies that address the full range of risk/reward profiles, including the due diligence information needed for client proposals.

Using our third party models you can outsource investment management tasks, including model portfolio construction and maintenance, scenario based economic forecasting, research on investments, due diligence on investments, investment committee functions, and client facing material used to communicate historical and forecasted performance of strategies implemented.

Many advisors have been able to lower their minimum account requirements, thanks to the efficiencies outsourced models deliver, and build up their accounts as they grow their AUM. This growth strategy can create your own funnel of accounts that will mature to your optimal account size.

Since you're using Tamarac Advisor® to manage your portfolios, you will be able to instantly review, accept and implement any model portfolio changes sent to you by Tamarac AdvisorServices.

Benefits of outsourcing models:

- ▶ Strategic asset allocation.
- ▶ Risk budgeting.
- ▶ Expected alpha.
- ▶ Return/risk analysis.
- ▶ Portfolio structure analysis and design – investment styles, active/passive and duration decisions.
- ▶ Investment policy development – goals and objectives.
- ▶ Responsibilities and guidelines.
- ▶ Multi-Asset class investment management - investment selection and due diligence.
- ▶ Monitoring of strategy versus benchmarks.
- ▶ Quarterly investment performance and policy compliance reporting.
- ▶ Monthly performance reports.
- ▶ Model change alerts.

Create more time for clients and referrals by using outsourced model portfolios from Tamarac AdvisorServices.

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