

The Asset Manager Platform

Grow Your Business by Accessing New or Increased Distribution Channels

Vestmark has deep relationships with all major sponsor and custodian firms, enabling you to expand your distribution reach and access new channels.

- Add model-based products
- Add manager-traded products
- Provide access to new channels with new products

USE CASES

Let us support your business growth

Gain Access to New or Increased Distribution Channels

In a marketplace experiencing robust growth, if process is holding you back from delivering your model-based strategies to many programs at once, outsourcing model delivery to Vestmark can help you scale distribution and achieve greater back-office efficiency with more power to impose controls, through:

- Vestmark becoming a single point of communication for your back-office team and managing communication with all your distribution partners.
- Vestmark managing your model rotation based on your firm's risk management rules and agreements with your distribution partners.

For institutionally focused asset managers, Vestmark can bring the technology, services, and distribution relationships you need to quickly and efficiently move into the retail market, by:

- Offering decades of experience and expertise within the US distribution channels, as well as deep knowledge around the SMA and UMA demands of the retail marketplace.

- Technology that enables personalization and tax management at scale, enabling you to provide an institutional experience to a broader market.
- Helping you identify and cultivate your retail relationships, quickly, to grow in a competitive marketplace with a centralized hub and connectivity to all major sponsor firms.

With regard to supporting existing relationships with breakaway advisors, Vestmark Advisory Solutions offers a simple, and supportive way to maintain continuity with advisors, regardless of their affiliations (or lack thereof) by:

- Enabling you to provide advisors continued access to your products/models without interruption, even when they go independent.
- Allowing those advisors to maintain the continuity of their client portfolios without imposing taxable events.
- Facilitating the advisor to maintain all client relationships, regardless of firm affiliation.

Why Choose Vestmark?



More Control

- Centralized hub and connectivity to all distribution partners – Vestmark covers both sides of the distribution equation
- Turnkey setup and quick time to market or customized packaged solutions to support your specific business needs
- Partner with technology that optimizes your business's "secret sauce" – Vestmark's consultative approach to helping design a solution leverages an experienced team and 20 years of successful implementations



Sophistication & Customization with Scale

- Scalable account-level tax management and tax-lot level accounting
- Seamless integration with optimizers
- Personalized portfolios; direct and customized indexing
- Full support for retail fixed income solutions
- Simplified and streamlined automated workflows to client specifications



More Flexibility

- We can support your manager-traded and model-based SMA business
- Design a software and services solution that fits your business needs
- Access a menu of packaged tech + outsourced services solutions that are designed to meet your specific business needs – where appropriate, solutions can be customized



Manage Risk

- Single pane of glass/hub to manage your entire SMA business in one place
- Improved operational efficiency – centrally manage, trade, and track your accounts including performance calculations and composite management across multiple sponsor programs and relationships
- Offload operational risk – option to outsource with a 100% onshore business model and an experienced team

Questions?

To learn more about Vestmark's platform for Asset Managers, visit www.vestmark.com

To schedule a demo, send an e-mail to inquiry@vestmark.com or call **781-224-3640**.