

# The Asset Manager Platform

Grow Your Business by Introducing New Products or Enhancing Your Current Product Offering with Expedited Time-To-Market

Vestmark's highly robust wealth management technology platform enables you to quickly bring new products to market offering customization and tax management at scale, including:

- Direct or custom index-based solutions
- Customized portfolios based on Environmental, Social, and Governance (ESG) preferences
- Retail fixed income solutions, including scalable solutions with the option for managers to maintain trading discretion for fixed income portfolios
- Model-based strategies to meet the growing popularity of UMA programs

## USE CASES

### Let us support your business growth

#### Launch New or Enhanced Products Quickly

As you are looking to offer innovative new products that gain traction in the marketplace quickly, Vestmark can partner with you to launch and scale fully customized SMA/UMA solutions that enable mass-personalization and automated tax management by:

- Accelerating time to market with Vestmark's consultative approach to sharing our best practices, helping design a solution, and leveraging our 20 years of experience in implementations.
- Optimizing internal operations by supporting you with our SaaS + outsourced services solution that enables efficiency with a low IT footprint and minimal fixed operational infrastructure on your side.
- Enabling seamless connectivity to all of your distribution partners via our extensive network of connections to all major custodians and distribution platforms.

If you want to embrace new client opportunities in a profitable way while mitigating risk, Vestmark provides technology and services that can help to absorb operational risk while allowing you to pursue new opportunities at scale without overwhelming staff, impeding operations, or threatening the quality of your current business, by:

- Enabling you with a combination of best-in-class platform technology and outsourced services packaged offerings that help you expand your product suite without building new and/or unfamiliar competencies, thereby helping to reduce risk.
- Taking advantage of Vestmark's comprehensive back-end support solutions, decreasing your operational footprint and helping increase efficiency.
- Expanding your infrastructure; Vestmark supports your operations model and builds around your preferred workflows to help maintain the value of your existing business.

# 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](http://www.vestmark.com)

To schedule a demo, send an e-mail to [inquiry@vestmark.com](mailto:inquiry@vestmark.com) or call **781-224-3640**.