

The Asset Manager Platform

Grow Your Business with a New or Enhanced Operating Model

Vestmark's platform is a highly robust trading and rebalancing engine integrated to all major distribution channels with scale to support volume spikes and future growth.

- Stop having to say “no” to new sales opportunities
- Increase the scale of your operations
- Support the launch of new and innovative products and strategies
- Expand the reach of your connectivity for distribution
- Increase efficiency for your team, reducing manual work
- Offload and/or better manage operational risk

USE CASES

Let us support your business growth

Improve your profitability, scale, and efficiency with a new or enhanced operating model

Vestmark offers prebuilt operations capabilities (tech and services) to enhance your back-office operations by:

- Eliminating the risk of building or expanding your operations in-house and supporting you with our centralized managed account platform and comprehensive suite of outsourced operational services that have tried and tested scalability and efficiency even in times of market volatility.
- Maintaining a 100% onshore business model, eliminating potential cross-border interruptions.
- Offering proprietary software – Vestmark develops its own software, so you're never at the mercy of a 3rd party.

If you want to expand your retail business and need help with technology, processes and personnel, Vestmark offers a more efficient way to operate within the retail marketplace by:

- Assuming operational responsibilities and decreasing your risk with our experience and expertise applying best practices to retail operations.
- Increasing your speed to the market, enabling you to focus your time and effort on your core competencies.
- Enabling personalization and tax management at scale on our proprietary and purpose-built wealth management technology platform.

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**.