

# Vestmark Services for Broker-Dealers & Advisors

Whether it's a challenge with maintaining a diverse open architecture stable of managers and strategies, desire to outsource model implementation, trading or overlay... or some of your middle and back-office operations, Vestmark offers a suite of solutions.



## Vestmark Manager Marketplace™ (VMM)

Is it becoming increasingly complex to maintain an open architecture set of manager and strategy model choices for your advisors?

We can help you to introduce an open architecture, single-contract solution while eliminating the cost and administrative burden of maintaining your own marketplace of separate account managers and asset allocation strategies.

Featuring **140** managers and **650** strategies, VMM offers centralized billing, a single contract, and a research portal where advisors can access manager ADVs and other due diligence information.

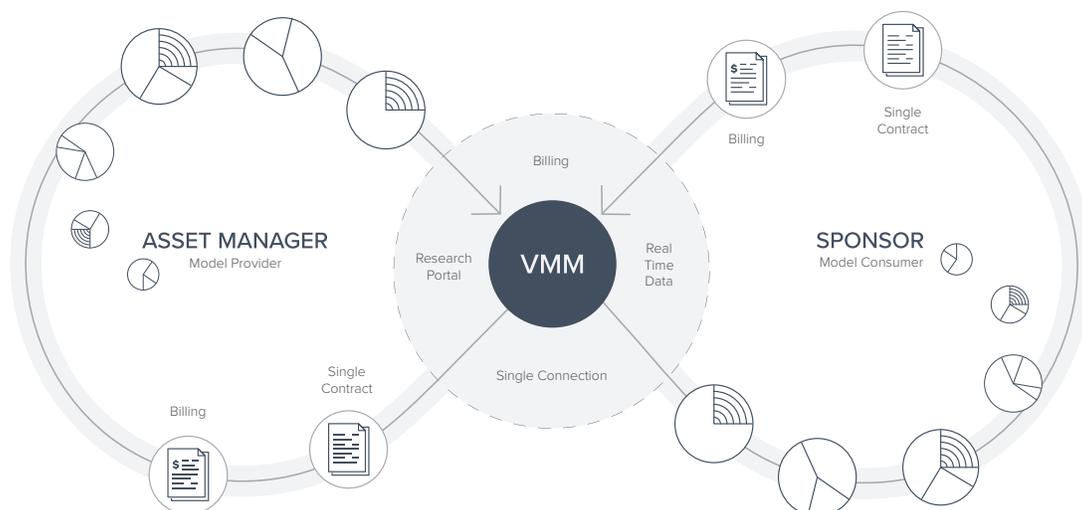


## Model Trading Service

Is it a challenge to scale the implementation of investment decisions or to manage complex models?

Supporting all model-based discretionary programs, this turnkey model implementation, management, trading, rebalancing, and overlay management service can create immediate scale for your trading operations.

Tailor a fully-outsourced solution or let us get your home office overlay service up and running quickly.



Vestmark Manager Marketplace: solving the access dilemma.

# Looking to scale quickly and create more efficiencies?

Right-size an outsourcing solution based on your unique business challenges or goals.



## Suite of Outsourced Services

Leveraging dedicated resources, expertise, and technology infrastructure can lower your costs and create immediate scale, enabling you to focus on growth.

- Account Administration
- Reconciliation
- Corporate Actions Processing
- Print Fulfillment & Mailing
- Trading Services
- Billing
- Performance Calculation, Management, Reporting
- Composite Management

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## Why Choose Vestmark for Outsourcing?

Our experienced professional team with deep industry background has been providing these services for more than a decade, supporting dozens of firms across the spectrum of the wealth management industry. Their well-established relationships with all major sponsors and custodians give us a unique ability to resolve issues and solve problems for our clients.

The team is able to leverage Vestmark's robust proprietary recon and trading network. We own and operate all of our technology and do not transfer any outsourcing tasks to third parties. Further, our entire service team and technology infrastructure are fully located in the US, which may offer a streamlined approach to data and privacy issues, as compared to working with offshore providers.

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## Questions?

To learn more about Vestmark's Services visit [www.vestmark.com](http://www.vestmark.com)

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

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