Adhesion wealth
A Vestmark Company

Adhesion OCIO+
More Ways to Grow Wealth

Making It Easier to Serve Your Clients Across All Market Conditions

Adhesion OCIO+ services help advisors harness the powerful combination of Adhesion Wealth's investment management platform and innovative OCIO services. Our integrated approach creates a real-time support system giving you access to the extensive expertise, research capabilities, and advanced technology and analytics you need to potentially generate better investment outcomes—all from a single, highly efficient interface.

More Than Just An Outsourced CIO

Many advisors are now welcoming the opportunity to outsource portfolio construction duties, whether it's because they prioritize client management over investment management, or they simply don't have time to cover every single base as efficiently as possible.

36%

Of the RIA firms surveyed currently outsource their investment management with another 17% that plan to do so in the next 12-18 months.

69%

Of advisors report that the primary benefit of outsourcing has been more time to spend on other services, client relationships, and business development.

58%

Of advisors who currently outsource their investment management report a decline in their operating costs.

61%

Of advisors report annual revenue growth of 10% or more since they decided to outsource their investment management.

30%

More revenue growth from those advisors who choose to outsource investment management vs. those who do not.

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All stats come from a January 2021 WealthManagement.com survey commissioned by Adhesion Wealth Advisor Solutions, involving more than 330 RIA firms.

Key Features

Helping You Differentiate Your Business In A New Era

The advanced, proprietary technology behind the Adhesion platform—combined with our experienced OCIO partners—makes Adhesion OCIO+ a next-gen financial delivery solution that can help future-proof your practice as we enter a new era with new norms. By providing advisors with an extra layer of skilled research and analytics capabilities, we can help you with the increasing complexity of portfolio construction and offer access to new asset classes while helping you differentiate your practice from the competition.

- Client experience:
  When bundled with our powerful suite of portfolio and practice management software and services, Adhesion OCIO+ offers your clients a modern, streamlined and comprehensive investment experience.
- Scalability:
  Smaller firms can benefit from our ability to scale their investment management process while their clients gain access to professionally researched managers and asset classes.
- Communications and reporting:
  The Adhesion Wealth platform makes it easy for advisors to keep clients educated and informed on an ongoing basis, so they're assured of real-time status of their investments through our easy-to-navigate dashboard.

What You Get With Adhesion

Service & Support
A industry-leading white-glove service and support team.

Extensive Investment Content
Roster of SMAs, ETF & Mutual Fund Strategists, and OCIO providers.

Flexible Deployment
A variety of investment programs & methodologies supported with manager selection that prioritizes risk management.

Comprehensive Overlay Services
Operational burden is on Adhesion Wealth, not your P&L.

Portfolio Construction Solutions
Continuously reduce tax impact, automate investing, and keep clients in line with risk/IPS with strategy tuning to refine rebalancing.

Tax Transition & Tax Management
Reduce tax impact on transitional assets and generate tax alpha.

Single Registration
All activity in a single account allows for coordinated operation of managers, all with a single 1099.

Cost Reductions
Lower cost than direct SMA or mutual fund (plus a better client experience and a reduction in operating expenses.)

Complete Control & Customization
Retain total control over client relationships and tailor their portfolios in efficient and scalable ways.

Brandable Advisor Desktop
360° view of true sleeve/model performance, client and practice analytics, performance reporting and proposal generation.

Our OCIO Partners:

WealthShield® and f3Logic

With easily integrated technology and specialized skills to help advisors serve their clients more effectively, WealthShield provides services built on the principles that risk management is the most important part of managing a portfolio, and the client is the ultimate benchmark. Through careful analysis of the current cycle, WealthShield designs portfolios that dynamically adjust to changing market and economic conditions.

WealthShield seeks to provide quantifiable sources of advisor-generated value, primarily through:

- Behavioral Financial Planning
- Asset Allocation Modeling
- Investment & Manager Selection
- Portfolio Construction & Rebalancing
- Tax Management

f3Logic provides Adhesion Wealth interface expertise and operational support to help maximize OCIO+ success.

Questions?

To learn more about how Adhesion Wealth can help you implement OCIO and investment management services in the most efficient ways possible, email **OCIO@adhesionwealth.com** or call **888-295-8351**.

ADH–FS/OCIO+/V2–12/21