

Outsourced Investment Management through Adhesion's OCIO+ Services

Making It Easier to Serve Your Clients

OCIO+ Overview

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.

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, & 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.

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

Key Features

- Ability to scale your investment management process while your clients gain access to highly-skilled managers and a diverse set of asset classes.
- Access to varying levels of customization depending on level of engagement.
- Capability to incorporate pre-trade tax aware considerations and other variables to ensure optimization of tax opportunities.

Key Benefits

- Selling of tax loss harvestable individual securities
- Complete Control & Customization
- Enhanced Communications & Reporting
- Improved Client Experience
- Portfolio Construction Solutions
- Tax Transition & Tax Management

The Adhesion Wealth Advantage

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. Adhesion OCIO+ helps advisors alleviate the burden of asset allocation, selecting asset managers, portfolio construction, trading and rebalancing, tax management, ongoing risk management and client reporting, so they can focus more on their core strength—client management.



Get in Touch

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Want to learn more about Adhesion's OCIO+ services?
Request a consultation with Adhesion Wealth today!

www.adhesionwealth.com

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