

Your Clients Have Goals; Can a Turnkey Asset Management Program Help You Meet Them?



The stakes for investment advisors and clients are getting higher. Morningstar's recent study of the investor expectations of financial advisors identified the top expectation of investors: "Help me reach my goals". Also important was the anticipation that the advisor be "knowledgeable on the tax consequences of investing". No longer is simply providing investment management enough; consumers want advisors that focus holistically on wealth management to help them identify, monitor, achieve their financial goals, and understand implications that arise from their investments. The end client, paying a fee for advice, desire advisors that can help them fully understand the scope and potential of the entire client portfolio and with the ability to offer education and advice to plan for the future. Simultaneously, advisors are feeling pressure to provide these expanded services in an often challenging market and changing legislative landscape. As a result, advisors may struggle to grow their business and to manage their existing client load. Your clients deserve your time and focus. Utilizing a Turnkey Asset Management Platform (aka "TAMP") as an outsourced investment management solution may help you place your focus on your clients' objectives.

How a TAMP Can Help Your Clients Meet Their Goals

PROVIDE BETTER CLIENT SERVICE.

- Delegate some of the more technical tasks including back-office administration and investment management.
- Outsource the day-to-day responsibility for investment management and the on-going due diligence required.
- Freedom and time to provide all the necessary financial planning and client support services that can improve client satisfaction.



CONCENTRATE ON YOUR SPECIALTY

- Develop and refine ways to differentiate your services. Whether it's a focus on helping a specific niche, or tax planning, estate planning, etc. a TAMP gives advisors more opportunity to differentiate their services.
- Become a true problem solver for your clients. Defining a niche for your client-base allows you to dive deeper into the specific needs required by a particular group.

FOCUS ON DEVELOPING YOUR BUSINESS ... AND YOURSELF

- Prevent advisor burnout or exhaustion. Newly found additional time can be used to catch your breath and increase your personal well-being, giving you more time to spend with family or staying healthy.
- Business development. Whether hosting webinars, creating podcasts, or writing articles and commentary, this newfound time can accelerate your sales, marketing, and education efforts enriching your business and your relationship with your clients.
- Additional marketing support, educational resources, and lead generation, which can provide a significant boost for smaller firms. These resources can help you gain traction with your marketing efforts much faster than if you had to develop them independently.



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