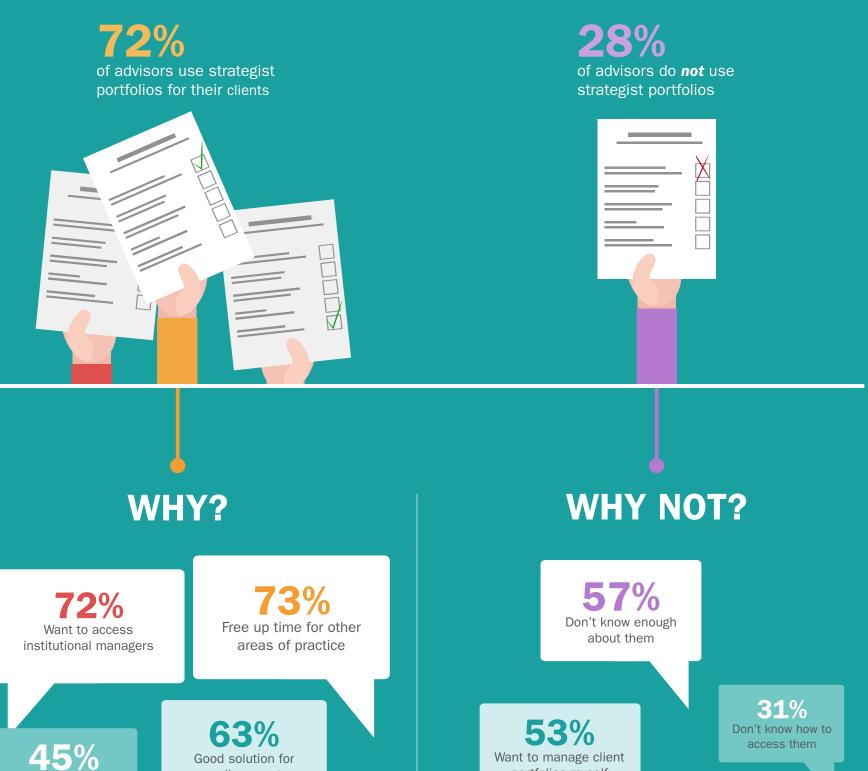


### **Are Advisors Using Strategist Portfolios?**

More time with clients. Access to institutional managers. Low cost. Fiduciary solution. These are some reasons advisors might use **strategist portfolios**—fully asset allocated solutions constructed by skilled investment managers using mutual funds and/or ETFs.

PMC conducted a survey\* to find out if and how advisors are utilizing these versatile solutions. Scroll down for our key findings.



Lower end cost for my clients

small accounts

portfolios myself

# HOW ARE YOU USING THEM?

For traditional asset allocation	<b>74%</b>
For downside protection	<b>61</b> %
Low-cost, low-turnover solution	<b>58</b> %
Income solution	<b>56%</b>
Small account solution	<b>53%</b>
Sustainable/SRI solution	30%

# WHAT ARE YOU USING INSTEAD?

Mutual funds	<b>79%</b>
Exchange-traded funds	<b>69</b> %
Separately managed accounts	<b>48</b> %
Annuities	<b>49</b> %

#### For information on Envestnet's Fund Strategist Program:

View a sample of the 130+ strategists available (<u>Factsheet</u>)
Core, Complement, or Satellite? (<u>Guide to FSPs</u>)
Lower volatility, smoother ride – APM vs. FSPs (<u>ENVESTAT</u>)

Contact your <u>Regional Consultant</u>

\* Based on results from an online survey conducted by Envestnet | PMC during August 2017. Results were based on answers from 223 respondents.

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