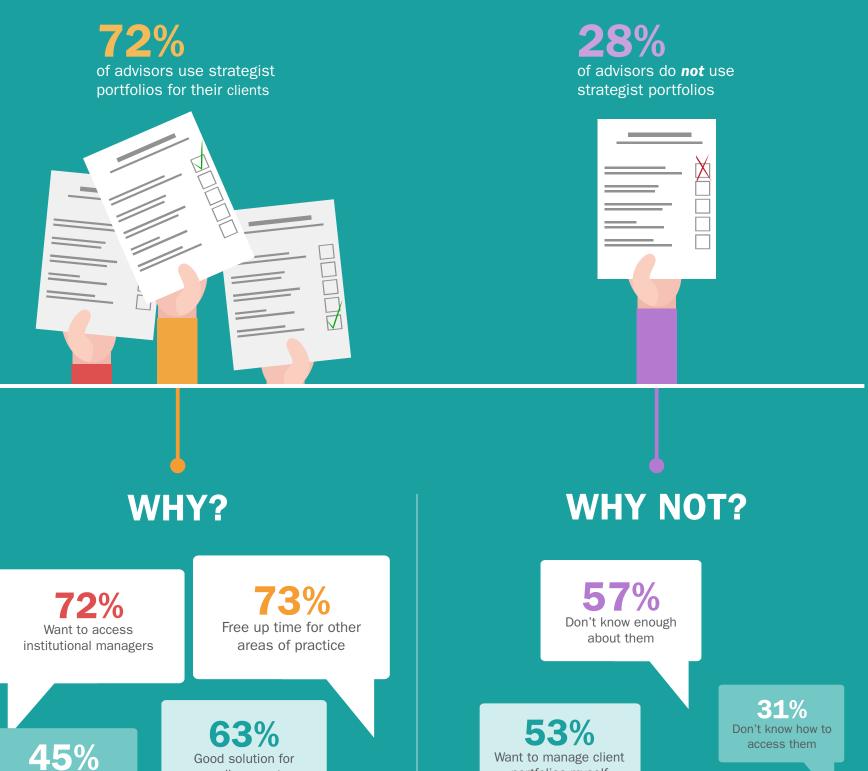


Are Advisors Using Strategist Portfolios?

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	74%
For downside protection	61 %
Low-cost, low-turnover solution	58 %
Income solution	56%
Small account solution	53%
Sustainable/SRI solution	30%

WHAT ARE YOU USING INSTEAD?

Mutual funds	79%
Exchange-traded funds	69 %
Separately managed accounts	48 %
Annuities	49 %

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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