

# Adhesion's Managed Account Platform Powered by Mercer Research

## About Adhesion

With 25 years of experience, Adhesion Wealth offers a highly personalized, open-architecture managed account platform. It empowers independent advisors to scale their businesses by providing a comprehensive solution for building customized UMAs and accessing SMA strategies. The platform streamlines operations, handling day-to-day investment tasks like trading, rebalancing, and tax management. Advisors get a single login for portfolio construction, multi-custodial management, and performance reporting, delivering sophisticated, efficient investment management while maintaining their unique brand.

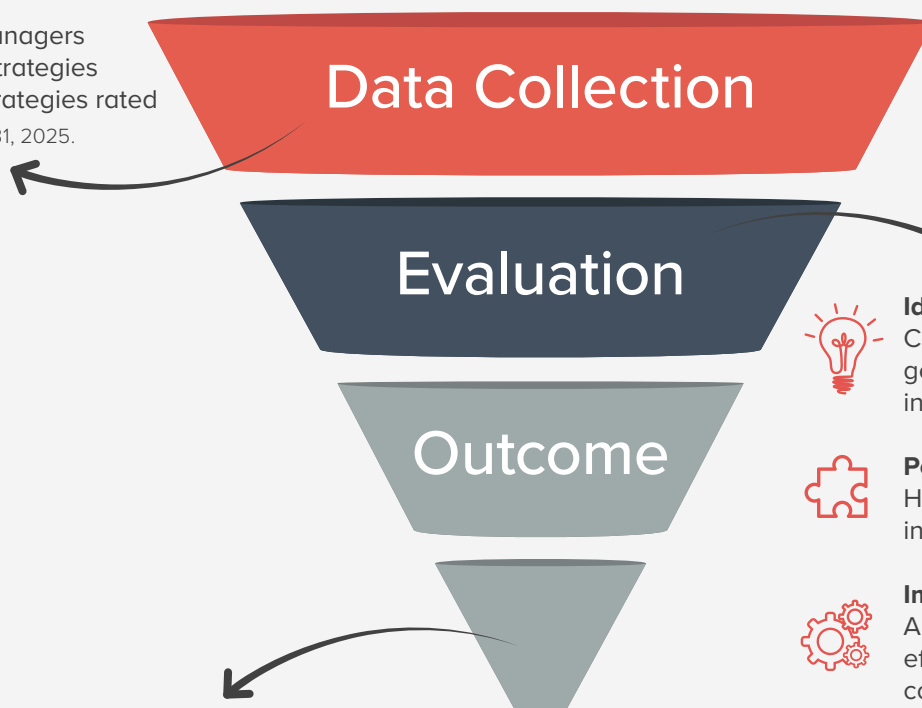
## Why Mercer?

Mercer's manager research can help deliver value. Clients need investment managers who can achieve their goals. Their proprietary manager research, conducted by over 200 professionals, as of December 31, 2024, help set Mercer's model apart. With a global network of research professionals, Mercer takes the pulse of change to investigate and select investment managers they believe offer the highest potential.

## Mercer's Research Process



**6,000+** managers  
**32,000+** strategies  
**11,000+** strategies rated  
As of March 31, 2025.



**A** Mercer has a high degree of confidence that the strategy will meet its expected performance objectives, over a relevant timeframe.

-  **Idea Generation**  
Can the manager generate value-adding investment ideas?
-  **Portfolio Construction**  
How are ideas translated into a cohesive portfolio?
-  **Implementation**  
Are ideas executed efficiently with minimal costs?
-  **Business Management**  
Is the investment firm well-run and competitive?

## Empowering Client Relationships:

- Mercer's Manager Choice: Access Mercer's curated list of robust managers across various separately managed account (SMA) strategies.
- Product Profiles: Leverage detailed product profiles for each strategy on Mercer's Manager Choice list, simplifying your due diligence and client communication.

## Mercer Due Diligence Process



Source: Mercer Wealth Management Services, 2025, Page 10

In today's evolving investment landscape, the Mercer Integrated Outsourced Solution available through the Adhesion Wealth platform provides you a powerful way to elevate your investment solutions to clients.

By integrating Mercer's research insights into your practice, you can access institutional-quality investment strategies while streamlining your decision-making.

To learn more or explore how this solution can enhance your advisory business, contact your Adhesion Relationship Manager today.

### IMPORTANT INFORMATION

This is for informational purposes only, is not a solicitation, and should not be considered investment, legal or tax advice. The information has been drawn from sources believed to be reliable, but its accuracy is not guaranteed and is subject to change.

**Investing involves risk, including the possible loss of principal. Past performance does not guarantee future results.**

Adhesion Inc. ("Adhesion") is an investment adviser registered with the U.S. Securities and Exchange Commission.

The attached information represents Mercer's methodology for determining the ratings of investment models on the Adhesion platform ("Mercer Research Materials"). Pursuant to Mercer's proprietary rating process the rating assigned to a strategy may or may not be consistent with its past performance. Ratings are also not indicative of future performance and may not be representative of any one client's experience. Mercer Investments LLC ("Mercer") provides the Mercer Research Materials directly to Adhesion. Such provision of Mercer Research Materials should not be construed to be an offer for or sale of securities of Mercer's services to clients of Adhesion and such provision of Mercer Research Materials should not be construed as an endorsement by Mercer for Adhesion or the services it provide to its clients. Adhesion is not soliciting any current or prospective client for Mercer. Although Mercer is not paying Adhesion for distribution of Mercer Research Materials and Mercer provides no services directly to clients of Adhesion, Mercer may receive benefits from the services it provides to Adhesion as a result of the distribution of the Mercer Research Materials.

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