

CASE STUDY

Aggregator

Background

The firm was trying to build out a proprietary managed account platform with the help of an asset management firm they acquired. Rapid growth and institutional manager demand quickly compelled them to seek outside help.

Winning Solution

Adhesion presented the firm with an opportunity to white label our platform. This platform would enable the firm to enroll accounts in traditional SMA, multi-manager (UMA), and/or proprietary advisor models. In addition, the depth of our manager roster, advisor dashboard, multi-branch (tenant) setup, home office views, and flexibility provided them with a turnkey platform and all the scale they need.

Key Takeaways

Flexibility

The Adhesion platform's flexibility enabled the firm's home office to incorporate multiple advisor groups, offering each a customized, branded platform.

Expanding Roster

Adhesion's expanding roster of managers included those popular among wirehouse advisors, providing a familiar and trusted selection.

Fixed Income Managers

Certain advisors found the option to include a fixed income manager in the UMA particularly attractive.

Outsourced Solutions

Adhesion's fully outsourced solutions freed advisors who managed their own models from daily trading and rebalancing, allowing them to concentrate on their core business activities.

Bulk Enrollment

Adhesion actively supported transitioning teams by facilitating the bulk enrollment of accounts, significantly reducing disruptions to their operations.

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