

# 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.

**72%**

of advisors use strategist portfolios for their clients



**28%**

of advisors do *not* use strategist portfolios



## WHY?

**72%**

Want to access institutional managers

**73%**

Free up time for other areas of practice

**45%**

Lower end cost for my clients

**63%**

Good solution for small accounts

## WHY NOT?

**57%**

Don't know enough about them

**53%**

Want to manage client portfolios myself

**31%**

Don't know how to access them

## 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	<b>30%</b>

## 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 ([Factsheet](#))
  - Core, Complement, or Satellite? ([Guide to FSPs](#))
- Lower volatility, smoother ride – APM vs. FSPs ([ENVESTAT](#))
  - Contact your [Regional Consultant](#)

\* 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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