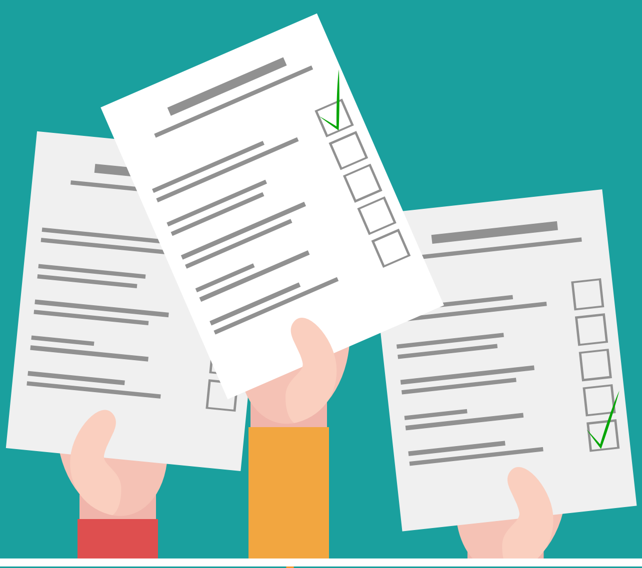
ENVESTNET PMC

Are Advisors Using Strategist Portfolios?

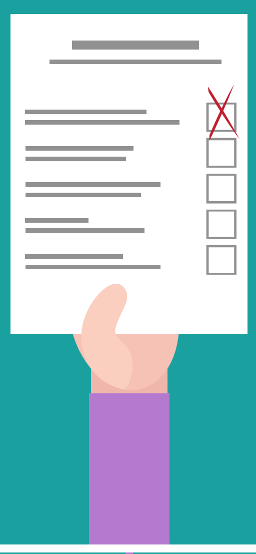
More time with clients. Access to institutional managers. Low cost. Fiduciary solution. These are some reasons advisors might use **strategist portfolios**—fully asset allocated solutions constructed by skilled investment managers using mutual funds and/or ETFs.

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	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 (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.