



Portfolio Management

Wealth Managers are increasingly outsourcing the asset & portfolio management portion of the business to large established third parties. The reasons for doing so are plentiful - but the primary benefits are that it is often cheaper and offers a more comprehensive solution for the end-client. Such third parties often enjoy economies of scale - and are able to analyse a broader asset universe than a typical wealth management firm.

However, the key is to make the administration and operations of implementing model portfolios smooth for all parties.

Privé Managers allows for client accounts to be linked to Model Portfolios, either managed internally or by external third parties - and for a process to be in place with respect to rebalances. Some of the benefits of this are:

- Automated Model portfolio factsheet generation
- Portfolio rebalances reach all clients in a timely fashion
- Portfolio Manager does not see any client information, only the AuM following his model
- Rebalances can follow a process prescribed by the Wealth Manager, in terms of final approvals or sign-offs
- If the service is not discretionary, suggested portfolio rebalances can be highlighted electronically to the end client via their portal, and confirmation/agreement can be collected electronically.
- Reduced operational risks as the process is automated



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