

Press Release

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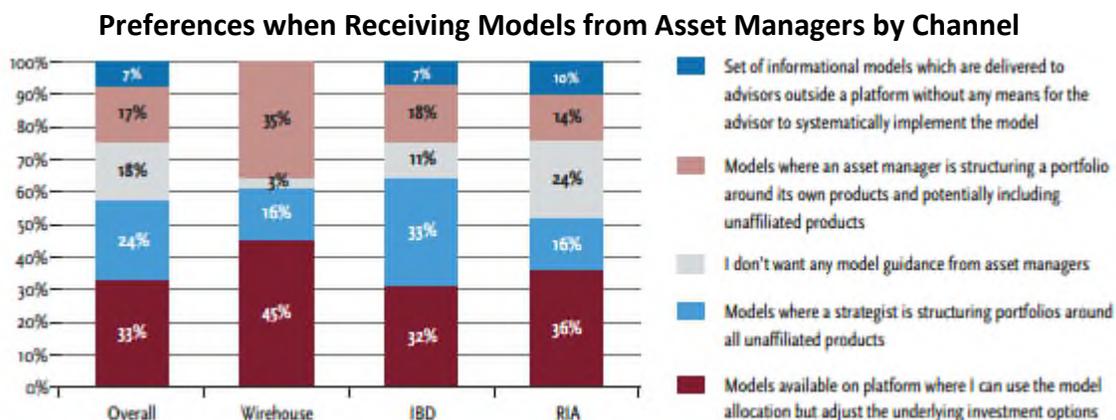
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How Can Asset Managers Effectively Provide Model Guidance to Advisors?

January 18, 2022, *Needham, MA* – Financial advisors have been embracing the use of model portfolios, making it paramount for asset managers to understand how they can best work with advisors on model guidance. Based on a recent FUSE Research Network survey of financial advisors, done in partnership with WealthManagement.com, one-third of advisors want the ability to adjust the underlying investment options on models available on their platform, which is the preferred method for Wirehouse advisors.

Meanwhile, nearly a quarter of advisors prefer an independent model strategist using unaffiliated products to structure portfolios—the top choice for IBD advisors, according to our latest report in the six-part Advisor Trend Monitor Series, *Model Portfolios: The Advisor View*.



Source: WealthManagement.com, FUSE Research Network

“Approximately 82% of advisors want some form of a guidance when receiving asset manager models,” notes Michael Evans, Director of BenchMark Research. “Many want to adjust the underlying investment options, which may be challenging for some model manufacturers. We encourage asset managers to be as flexible as possible since those with a rigid structure to their model delivery and/or usage of unaffiliated products are likely to limit their pool of advisor prospects.”

In addition to examining the outlook for model guidance among advisors, the Advisor Trend Monitor Report – *Model Portfolios: The Advisor View* covers current and future use of models, buying-decision criteria, preferred product mix and most popular model providers, among various other topics. Overall data survey findings are presented with by channel, average client age and account size, advisor AUM and age, team structure and practice type.

The FUSE Advisor Trend Monitor is a survey-based report series that provides timely insight into advisor views on a range of issues central to asset managers' decisions about resource allocation. With the ongoing support of our partner, WealthManagement.com, FUSE releases a total of six reports annually that comprise the Advisor Trend Monitor report series.

For details about obtaining a copy of *Model Portfolios: The Advisor View*, please email Jason Heinhorst at jheinhorst@fuse-research.com or call (720) 221-5223.

[About FUSE Research Network LLC](#)

FUSE was launched in 2008 with the view that research and consulting support for asset managers has failed to evolve with the changing needs of the client. The future competitive environment will demand that clients make important business decisions within shorter and shorter timeframes.

In order to support clients in this setting, FUSE provides a dynamic research platform that covers our clients' current and future decision areas (strategic and tactical). Our goal is to become an invaluable business partner through the delivery of highly informed and forward-looking recommendations that are among the critical inputs our clients need to optimize results.