

## Press Release

FOR IMMEDIATE RELEASE

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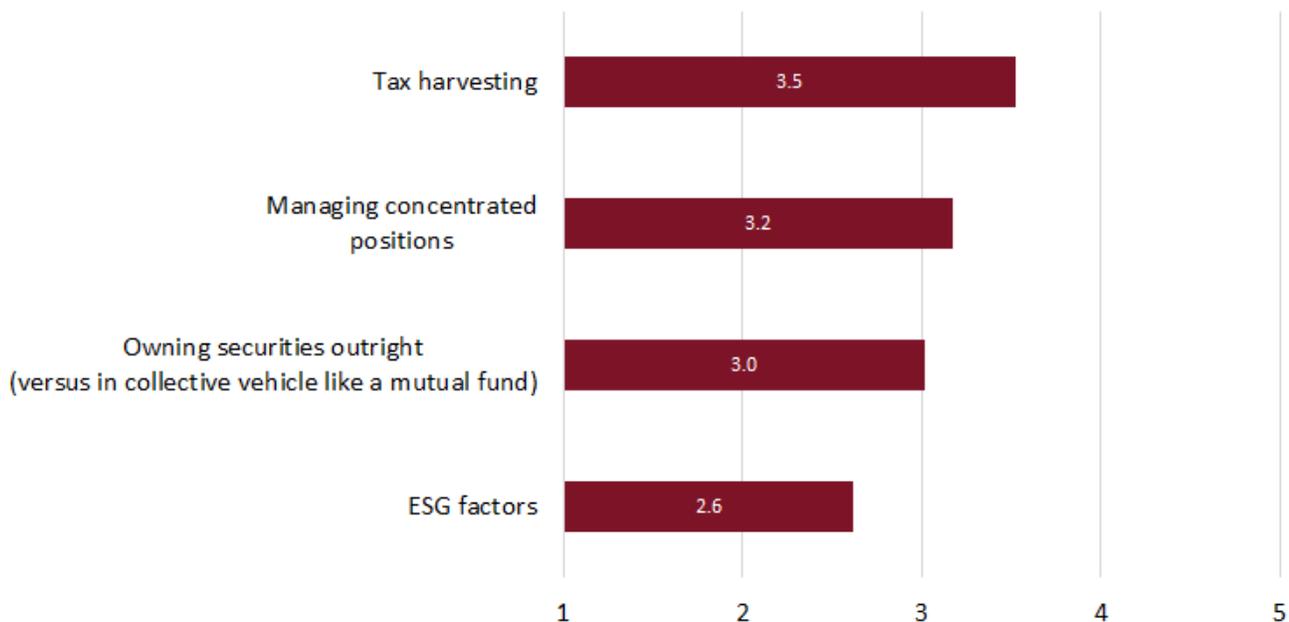
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## Tax Harvesting to Lead Future Client Demand

August 29, 2022, Needham, MA –The bear market of 2022, on the heels of a prolonged bull market, has brought tax management capabilities to the forefront of advisor services. Portfolio construction services have also evolved so that advisors can more broadly offer customized portfolios to solve specific client issues. As such, it is not too surprising that tax harvesting is the top portfolio customization process surveyed advisors expect client demand for in the future, according to the latest findings from FUSE Research Network’s Advisor Trend Monitor Series Report – *Portfolio Construction: The Advisor View*, published in conjunction with WealthManagement.com.

### Aspects of Portfolio Customization Advisors Expect the Most Client Demand for in the Future



Note: Scale of 1 to 5 with 1 = No Demand and 5 = Most Demand

Source: FUSE Research Network, WealthManagement.com

“Overall, and in every advisor demographic examined, there was unanimity that tax harvesting would have the greatest client demand,” says Michael Evans, Director of BenchMark Research at FUSE

Research. “Also, advisors were consistently clear that client interest in ESG factors ranked last, despite the plethora of publicity around ESG. As advisors seek to provide more personalized service to clients, customized portfolios and understanding the specific future demand in this area will be critical knowledge for asset managers.”

In addition, the Advisor Trend Monitor Report – *Portfolio Construction: The Advisor View* explores portfolio construction teams at asset managers including advisor engagement and servicing, timing, capabilities as well as portfolio construction team rankings. This survey also considered advisors' reliance on the home office services, what is driving shifts in client goals and their risk appetites, and usage of home office models and manager research groups among other topics. Overall data survey findings are presented by various advisor demographics.

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.

For details about obtaining a copy of Advisor Trend Monitor – *Portfolio Construction: The Advisor View*, please email Jason Heinhorst at [jheinhorst@fuse-research.com](mailto:jheinhorst@fuse-research.com) or call (720) 221-5223.

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### [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.

