

Press Release

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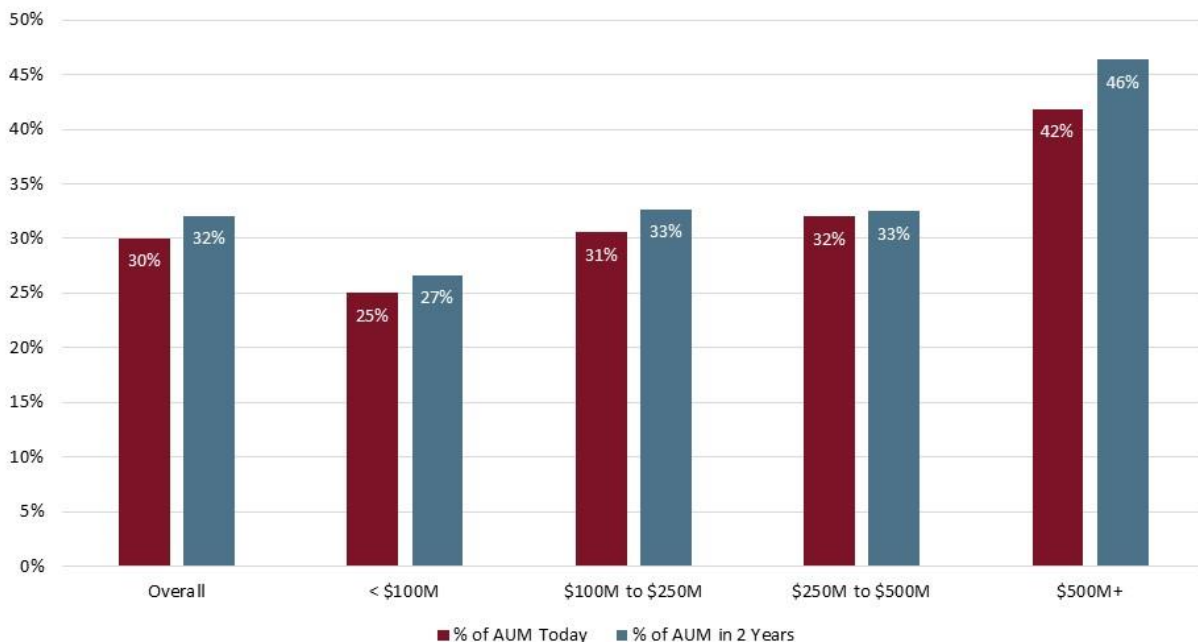
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Home Office Research Teams Projected to Incrementally Impact Advisors' Assets

October 2, 2023, Needham, MA – Distributors want a consistent experience for their clients, including client service standards and asset management. The use of models and manager recommendations is one tool distributors use to deliver a consistent solution to managing client assets. Based on findings from FUSE Research Network's Advisor Trend Monitor Series Report – *Portfolio Construction: The Advisor View*, 30% of surveyed advisors' current assets are influenced by home office research teams, and that percentage is going to modestly increase to 32% within the next two years.

Percentage of Advisors' Total Assets Influenced by the Home Office Research Team: Currently and in Two Years



Source: FUSE Research Network

“Home office influence is significantly higher for advisors with more than \$500 million in assets under management, which is a very sought-after group of advisors,” says Michael Evans, Director of BenchMark Research at FUSE Research. “Advisors with the largest books in our survey anticipate influence growing to a substantial 46%. Also, another important group of advisors, teams with in-

house due diligence, expect 39% of their client assets will be influenced by the home office research team in two years.”

In addition, the Advisor Trend Monitor Report – *Portfolio Construction: The Advisor View* examines portfolio construction teams at asset managers including advisor engagement and servicing, timing, capabilities as well as portfolio construction team rankings. This survey also considers 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 or call (720) 221-5223.

[About FUSE Research Network LLC](#)

FUSE was launched in 2008 to deliver tactical decision support that improves the effectiveness of the sales, national accounts, marketing, and product functions at investment management firms. To deliver on its unique value proposition, FUSE has built a decision support team that is unparalleled in its ability to deliver practical and actionable guidance in response to client challenges. By carefully cultivating a network of industry contacts from all facets of the business, FUSE is able to deliver solutions that go well beyond traditional business intelligence offerings.

