



# The New Managed Account Solutions Handbook: How to Build Your Financial Advisory Practice Using Managed Account Solutions

*By Stephen D. Gresham, Arlen S. Oransky*

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Industry experts share their insight and tell you why:

Unified managed accounts represent the future of the managed money industry.

"No other platform offers so many options and can be customized to meet the needs of so many different types of investors," says one of the nation's most prominent money managers. "We are able to address a wide variety of investment needs with a single product." (Chapter Mutual fund wrap accounts are enjoying a resurgence in popularity.

"With mutual fund advisory accounts, advisors can develop a consolidated strategy for their clients utilizing mutual funds," explains one top executive at a leading investment bank. "Investors know that proper asset allocation produces better results." (Chapter 3)

Exchange-traded funds have exploded in popularity with clients and advisors.

"ETFs have changed the landscape by offering financial advisors a new way to diversify their clients' portfolios," says the national sales manager of one of the world's largest ETF providers. "Advisors can fully diversify across all asset classes." (Chapter 4)

Client demand is fueling the growth of alternative investments.

"Larger clients are asking for these types of investments," says one director of

investment consulting solutions at one of America's largest banks.

"Diversification to minimize risk is the key incentive for adding alternative investments to a portfolio." (Chapter 4)

They'll also teach you how to:

\*

Determine if managed account solutions are right for you, your practice, and your clients

\*

Transform your financial advisory practice into a wealth management business

\*

Differentiate yourself from other advisors

\*

Develop a recurring revenue stream that will enable you to grow your business

\*

Attract new clients and capture additional assets from existing clients

\*

Conduct successful client meetings and host seminars that get results

\*

Position yourself as a provider of managed account solutions and partner effectively with other advisors, allied professionals, and the media

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**The New Managed Account Solutions Handbook: How to Build Your Financial Advisory Practice Using Managed Account Solutions By Stephen D. Gresham, Arlen S. Oransky Bibliography**

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### **Editorial Review**

From the Inside Flap

While the amount of assets held in separately managed accounts has more than doubled over the past five years, this growth pales in comparison to what lies ahead. Over the next five years, the first wave of retiring baby boomers—the richest class of people in world history—will fuel the need for financial advisors who can provide consolidated wealth management solutions for complex financial needs, from innovative investments ideas and risk management recommendations to tax-sensitive planning tips. The only platform that can provide all of these services is the managed account.

The New Managed Account Solutions Handbook is the definitive reference guide for wealth managers who want to expand their financial advisory practices, attract high-net-worth clients, and establish recurring revenue streams. With a Foreword by Christopher L. Davis, President of the Money Management Institute—the national organization representing the managed account solutions industry—this reliable resource will quickly enhance your understanding of this discipline.

Throughout these pages, renowned industry pioneer Steve Gresham and Money Management Institute executive Arlen Oransky discuss the strategies of professionals who have successfully integrated managed account solutions into their businesses and gather insights from undisputed leaders of this industry.

Divided into twelve easily accessible chapters—which can be read independently of each other—The New Managed Account Solutions Handbook:

- Provides an overview of the managed account industry from its origins in pension reform legislation to the new options being offered today
- Details the advantages of managed account solutions and offers advice on how to determine if managed accounts are right for your practice
- Outlines ways to build on your managed account success and explores what the future might hold for the industry
- And much more

Managed account solutions represent a higher level of service for the investment side of your client relationships, allowing you to focus more time on the vital areas of client service and attend to the overall wealth needs of your best clients. With this book as your guide, you'll discover why managed account solutions should be an integral part of your financial advisory practice and learn how to transform your practice from the outdated, commission-driven model of yesterday to the fee-based, professional practice of the future.

From the Back Cover

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#### About the Author

**Stephen D. Gresham** is Executive Vice President and Director of Retail Markets for Phoenix Investment Partners, Ltd., the \$42 billion asset-management division of The Phoenix Companies. Prior to joining Phoenix, he managed his own wealth-management consulting firm, The Gresham Company, LLC, which served a global clientele of more than fifty financial services companies. He is also author of the recently released Wiley title *Advisor for Life*, as well as *The Managed Account Handbook* and *Attract and Retain the Affluent Investor*. Gresham serves on the Board of Governors at the Money Management Institute and is a founding board member of the International Money Management Institute.

**Arlen S. Oransky** is Vice President of the Money Management Institute, the national organization representing the managed account solutions industry. He leads the organization's membership acquisition and retention efforts. Oransky has over twenty-five years' experience in the financial services industry working with leading advisors and has served as senior vice president for Weiss, Peck & Greer Investments and as vice president and product manager for TIAA-CREF.

## **Users Review**

### **From reader reviews:**

#### **Crystal Dewitt:**

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