

RIGHTSOURCING YOUR NEEDS: Model Delivery Services

In a continuous effort to empower your success through innovative solutions, Archer now offers model delivery services within our suite of outsourcing options.

The advantage of participating in UMA platforms that take in a model portfolio is that managers can leverage their investment expertise without requiring operational support. However, as the number of models and various destinations grows, this process can quickly become burdensome and distracting, especially managing a rotation schedule and the many unique formats and requirements of each UMA platform.

Outsourcing model delivery to Archer can eliminate much of the additional support required by managers and traders, thereby improving efficiencies and operating margins while empowering managers to once again focus on delivering investment expertise.

Archer provides a dynamic model maintenance interface that allows managers to choose a full model refresh, or individual security changes. Archer establishes a model account to maintain positions in a real-time environment, capturing activity such as mandatory actions and cash dividends.

Same-day model delivery output is customized to meet each platform's requirements, including e-mail and web-portals. Archer can also deliver scheduled periodic model updates to sponsors.

Archer's model delivery services include:

- Delivery rotation unique to each strategy across sponsors
- Option to include SMA trading and institutional accounts within rotation
- Pre-market checks to ensure corporate actions have been captured and are accurately reflected
- Audit packages available with time stamps to confirm model changes and records of delivery



For more information about Archer and all available services, you can email info@archerims.com, call 484 625 6271, or visit archerims.com.