

case study

ARCHER'S SOLUTION FOR MULTI-SLEEVE ACCOUNTS

Archer works with a variety of asset managers, from large global managers to emerging boutique managers, to help them streamline operations and scale. Here's how we helped one multi-asset class manager expand their product offering by packaging up strategies to meet demand in the RIA channel.

the challenge

An established global manager was looking to expand their brand and grow their business by packaging equity and fixed income strategies within a single account structure to meet the demand from financial advisors and intermediaries. However, their technology did not support the product composition and account structures, and their staff's inexperience with the new strategy limited their ability to scale. Additionally, the firm was under pressure to maintain or reduce costs.

archer's solution

The firm leveraged Archer's experience and platform to create multi-sleeve accounts, in which multiple assets rolled up to one custodian account. Archer's technology allowed for a scalable solution, reducing future capital expenditures and potential staff augmentation, and allowing them to further expand their offering to include models of models.

As a result of their targeted product offering, the firm transformed their brand to be known as a solution provider for the RIA channel.

For more case studies, white papers, overviews, and videos on Archer's solutions, please visit the Resources section of

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