

SOLUTIONS FOR GROWTH: EXPAND DISTRIBUTION



The key to expanding product distribution is having the right infrastructure support. Archer puts your team on the fast track to enter new distribution opportunities. From UMA model delivery to SMA participation, our powerful technology and industry connections significantly reduce cost of entry and time to market. We leverage long-term relationships with custodians and brokers to ensure sponsor program compatibility and unencumbered data flow. Every element of our turnkey solution integrates seamlessly with your infrastructure. With the technology-enabled outsourcing support from our experienced operations team, your team hits the ground running.

THE CHALLENGE

A global investment manager was seeking a way to gain market share with advisors that service high-net-worth clients. The firm had been offering a suite of model-delivery strategies through UMA platforms and had significant interest from advisors to access the firm's investment expertise through SMA strategies, whose tax and expense benefits were attractive to high-net-worth investors. Without the infrastructure in place to support separate accounts at scale, the manager needed a way to quickly enter this new market.

THE SOLUTION

The firm tapped Archer to get its SMA offering quickly to market with strategies that had previously only been available via mutual funds and closed-end funds. Archer's operations solution included account maintenance and trade administration services, and its technology enabled the needed connections to wirehouses and other institutional providers. The firm was able to quickly and efficiently introduce the SMA strategies, and capture advisors' and investors' interest. The firm successfully leveraged their existing products into new distribution opportunities, experiencing growth without increasing their technology or operations footprint.