



## CAPITAL MARKET CONSULTANTS

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*Asset Management Programs*

### ASSET MANAGEMENT PROGRAMS

#### **The Key to Success**

Building a successful fee-based investment brand demands a thoughtful market assessment, user friendly technology, skilled investment craftsmanship and informed service-oriented advisors. Investors remain loyal to financial advisors able to map and deliver a practical, understandable and deliverable service solution for their needs, preferences and expectations.

#### **Program Design & Maintenance**

CMC develops privately branded, fully customizable asset management programs for financial intermediaries. Services may include assisting with operational design, investor profiling, asset allocation, manager/fund selection and ongoing due diligence. CMC has also developed programs built around proprietary investment strategies. CMC collaborates with selective technology vendors to enable web-based program delivery to advisor desktops.

#### **Advisor Education**

The critical ingredient to successful investment program growth is a well informed, motivated and caring financial advisor. CMC provides ongoing education and training to help firms increase the knowledge base of their client handlers. The confidence that comes from a solid knowledge base translates into confidence.

#### **Client Communications**

Our privately branded programs may include everything from fully customizable product and model portfolio "tear sheets," to presentations, newsletters, charts and graphs.

*For more information contact Barry Mendelson:  
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### ABOUT US

Founded in 2002 and located in Milwaukee, we serve a broad range of clients throughout the United States. Flexibility and choice define our consultative approach to service.

#### **Mission**

Our mission is to advance the financial well-being of investors and to make it possible for those financial intermediaries with whom we work to be the investment provider of choice in their local markets.

#### **Clients**

CMC serves various intermediaries that outsource key investment program functions. This enhances their service to clients, differentiates them and documents thorough execution of fiduciary responsibilities. Our clients include banks, trust companies, wealth management firms, broker-dealers, accounting firms, law firms, insurance companies, and family offices.

#### **Team**

CMC employs seven associates. Our credentialed staff has over 100 years of combined investment experience.

#### **Independent and Impartial**

The freedom to provide impartial, independent and objective advice is fundamental to who we are as an organization. We are not affiliated with any investment management firm nor do we receive compensation from any such organization for recommending their investment strategies. CMC is privately held.