

# CMC Private Labeled Asset Management Programs

CMC develops privately-branded, fully customizable asset management programs for financial intermediaries.

## The Keys to Success

Investors remain loyal to financial advisors able to decipher their needs and deliver a practical investment and service solution to meet their preferences and expectations. Building a thriving fee-based investment brand demands a thoughtful competitive assessment, skilled investment craftsmanship and an informed, caring and service-oriented advisors. Leveraging your firm's existing brand with a private-labeled investment solution can be the difference making catalyst for accelerated asset growth.

## Program Design & Maintenance

CMC develops differentiated, privately-branded asset management programs for financial service firms. Services may include assisting with investor profiling, asset allocation management, manager/fund selection, and ongoing due diligence reporting. We have also developed programs built around other firm's proprietary investment strategies so in-house legacy strategies are not a limitation. CMC collaborates with selective technology business partners when needed to enable web-based desktop program delivery.

## Advisor Education

An important ingredient to successful asset management program adoption is a well informed and motivated financial advisor. CMC provides ongoing education and training support to help firms increase advisor comfort with their firm's program. That comfort springs from a practical knowledge base and practical know-how that translates into confidence and accelerated asset accumulation.

## Client Communications

Our privately branded programs may include everything from fully customizable product and model profiles to presentation, newsletters, a charts and graph library.



## Capital Market Consultants, Inc.

A research and asset management firm focused on serving other advisors, CMC provides investment solutions and outsourced Chief Investment Officer services for wealth management professionals.

Founded in 2002, CMC is headquartered in Milwaukee, WI. For more information contact:

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