



The key to eCIO services is  
advisor control and flexibility.

**eCIO powered by Capital Market Consultants, Inc.**  
A la carte investment management research services for wealth managers

## **Outsourced Institutional Quality Investment Research for every Advisor**

CMC's eCIO services enables you to build your own research package on mutual funds, SMAs, model portfolios, asset allocation, client communications and more by leveraging the expertise, analytical power and reporting capabilities of a respected institutional investment management consultant.

With eCIO you can pick and choose CMC reports and the research relevant for your needs and business budget with no need to wade through and pay for mountains of data you will not use. A la carte pricing allows you to custom build your service package so you can pick the research, reports, reporting frequency that suits your needs.

There is no single eCIO service to fit every wealth management business. You can build a service that is narrow and focused to supplement your own research or you can outsource more of your investment research needs into a full fledged outsourced CIO relationship; it's up to you.

**The key to the eCIO service is advisor control and flexibility.** Speak with your CMC advisor consultant to discuss your needs.

## **eCIO Services May Include:**

### **Fund, SMA or model portfolio research**

- Returns-based style analysis
- Holdings-based performance attribution and style analysis
- Comprehensive annual due diligence

### **Product or model portfolio fact sheets**

### **Investment Policy Guidance**

- Long term capital market assumptions
- Asset allocation guidance

### **Client Communications**

- Economic and market commentary
- New Alerts
- Chart library

### **Weekly global markets performance table**

### **Performance scorecards**

...and more

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