



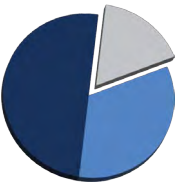
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BOUTIQUE IS BETTER

Why We Should Be Your Preferred TAMP Solution



As a Hybrid RIA Platform, we understand the challenges advisors face in differentiating themselves. Our proven investment strategies and client-focused education, which have been the foundation of our success with Retail Investors since 2005, are now accessible to independent Financial Advisors seeking greater value for their clients and practices.



Our boutique global macro research enables forward looking portfolio asset allocation decisions, that aligns seamlessly with client education and advisor coaching. Maximize client value and attract AUM with our comprehensive operational support.



Leverage AWAIM as your Core Global Macro Total Portfolio Solution for clients that expect more from you.

YOU CAN'T DIFFERENTIATE UNLESS YOU DO SOMETHING DIFFERENT

Don't offer more of the same. Demonstrate your discernment by leaving behind commoditized big box TAMPs and representing a unique and value additive investment solution.

LEVERAGE US FOR YOUR SUCCESS



ENGAGE WITH THOUGHT LEADERS

The AWAIM Investment Committee's forward-looking economic outlook is continually being reassessed as market dynamics shift. Plug into our proprietary research and thought leadership to educate your existing and prospective clients.

- Investment Committee members available for client pitch/retention meetings.
- Augment your portfolio analysis with our Investment Committee feedback, supporting your ability to retain and win more AUM.
- One-On-One practice coaching for you and Your Team.
- AWAIM's timely research and proactive portfolio management takes the heavy lifting off your shoulders through challenging market conditions.

TIMELY CONTENT IS KEY



PODCAST

Unscripted & Casual
Discussion of Economic themes



FORBES

In-Depth Monthly articles
published at Forbes.com



RESEARCH HIGHLIGHTS

Points of Interest from the AWAIM
Investment Committee



YOUTUBE VIDEOS

Latest Capital Markets
Economic Perspectives



LEVERAGE OUR RESULTS

White Label the AWAIM Total Portfolio Solutions Suite™ Fact Sheets as your Own
Work with a Boutique Investment Management Firm with a track record of success
in helping firms like yours revamp their Asset Gathering efforts

SCHEDULE YOUR PLATFORM REVIEW TODAY



Assessment of your current portfolio solutions
relative to upcoming regulatory changes



Analysis of Risk Exposures



Benchmark Review



Cost-Benefit Analysis

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