



NewEdge Advisors Investment Solutions

AN EXTENSION OF OUR FIRM'S MISSION

Giving successful advisors more time, margin and flexibility to grow their business.

Our mission at NewEdge Advisors is to give successful advisors more time, margin and flexibility to grow their business. Unlike most RIA firms that only provide their firm's proprietary research and portfolios, and then charge advisors for their intellectual capital, at NewEdge, we leverage our immense resources, services and human capital to unlock the power of partnership on behalf of our advisors.

We have attempted to levelize the cost for advisors to manage assets themselves or outsource portfolio management to our team.

Our Investment Program provides a flexible, low-cost, customizable UMA investment solution. Spend more time on financial planning, reduce your workload, and increase efficiency and outcomes at just a fraction of industry costs...or at no additional cost at all.

Advisor Resources



Access to a vast selection of investment strategies across styles, asset classes and risk-tolerances



Assistance navigating resources at our different custodians



Familiarity with investment related technology, tools and partners



Assistance with Orion and portfolio management technology



Timely communication around portfolio changes



Investment mapping



Internal CFA resources



A valued second opinion

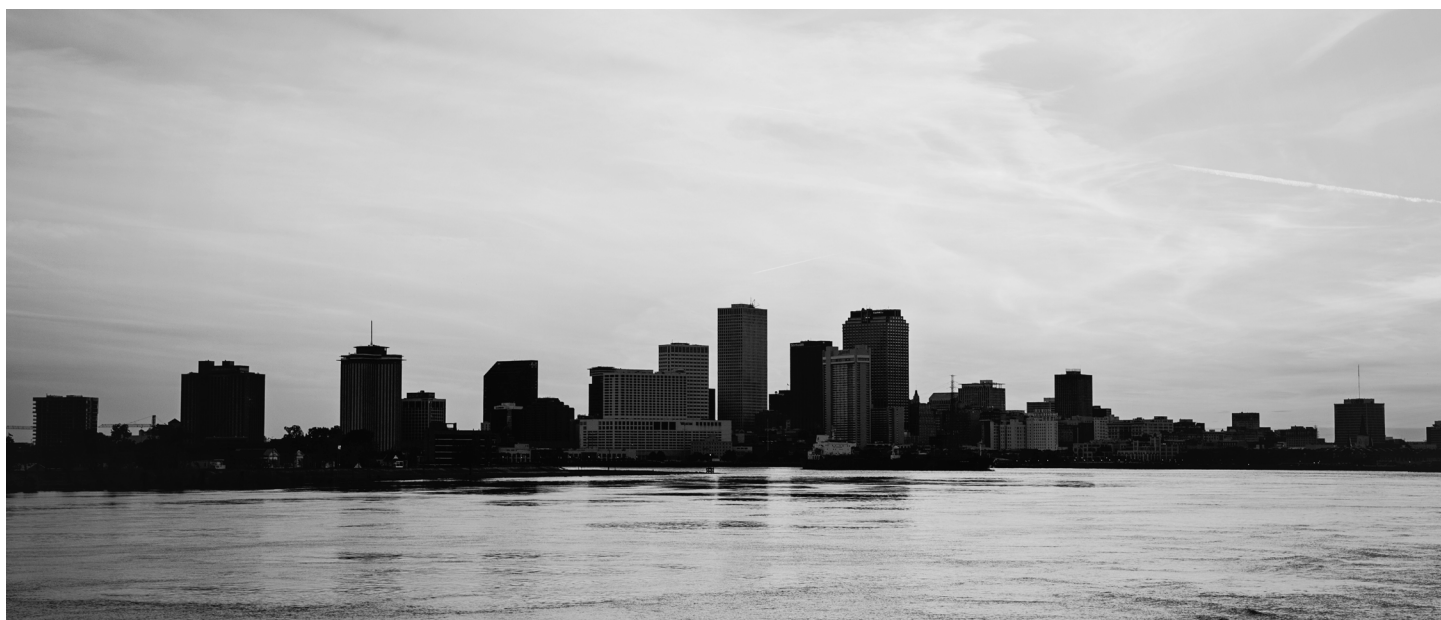


Portfolio analysis



Proposals and RFPs

Advisor Use Only – Not for Client Distribution



WHY MODELS

The time you spend with clients is meaningful. Model Portfolios alleviate the time and pressure to build and regularly manage your own investment strategies. Our program helps advisors focus on the big picture, spend more time on planning and focusing on client milestones that matter.

Advisor & Client	NewEdge Advisors
Discuss investment goals, risk tolerance and time horizon	Employs an experienced investment team
Develop appropriate investment strategy	Maintains model portfolios, reviews and reports performance
Make adjustments as markets, plans or life events occur	Regularly monitors global macroeconomic environment and changes investments in model portfolios as needed
Regularly review performance and objectives	Commitment to keeping access, platform and investment costs low



Using models can reduce the amount of time spent on investment management by **50%**, giving back advisors 8 hours per week.

78%

of advisors believe their clients care more about **planning, service, and support** than outperforming the market.

83%

of advisors agreed that model portfolios **are essential** to giving clients a planning experience.

85%

of advisors **now use models**, and over half of all advised assets are in some form of model, whether advisor-created or strategist-built.

Source: Distribution in a model-driven age, Broadridge Financial Solutions, Inc., 2019.

INVESTMENT STRATEGY GUIDE

Mix & Match Models

Our investment model program was built specifically to provide advisors with access to world-class portfolio construction and institutional managers.

With strategies across investment styles and asset classes, advisors have the flexibility to select model portfolios or a combination of model portfolios that are most suitable for each client.

We also offer a simple, discretionary UMA solution that allows advisors to create their own custom models and allocations out of our platform.

Models Offered

- Adaptive RISKHedge
- American Funds
- BlackRock
- Dimensional
- Dorsey Wright
- First Trust
- Global X
- Goldman Sachs
- NewEdge Capital Group
- Invesco
- PIMCO
- Russell Investments
- State Street
- Vanguard
- Your Own!





BLACKROCK



DORSEY WRIGHT



GLOBAL X
by Mirae Asset

Goldman Sachs



PIMCO



STATE STREET GLOBAL
SPDR® ADVISORS





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