

FactSet Model Center: A Portfolio Marketplace for Wealth Advisors

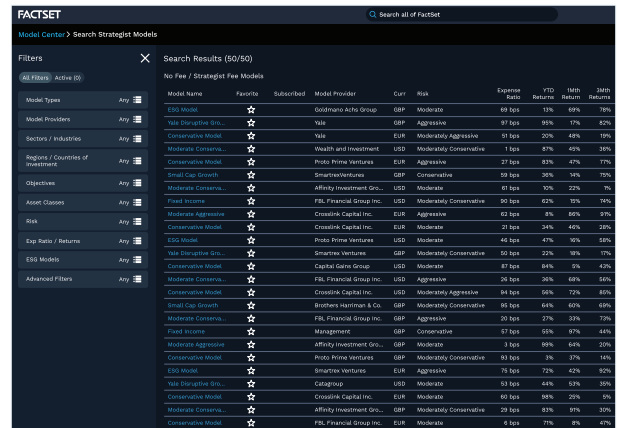
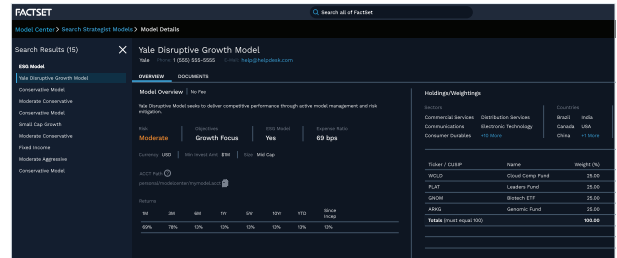
Establish scalability and efficiency in your advisors practice by utilizing FactSet Model Center. Leverage pre-built model portfolios from asset managers and retain full discretion without strategist fees.

MODEL PORTFOLIOS FOR SCALABILITY AND EFFICIENCY

Use pre-built model portfolios in FactSet Model Center to spend more time on business development and client service and less time assembling portfolios from scratch. Retain full discretion by optimizing your portfolio construction and maintenance by accessing model portfolios via the FactSet workstation. Perform analysis, integrate models into your practice, and create reports for end clients.

Key Features and Benefits

- Leverage industry expertise from managers within FactSet’s intelligible interface
- Access model portfolios developed by FactSet Model Center’s expert, third-party partners
- Reduce portfolio creation costs by using strategist fee-free model portfolios
- Access intuitive screening tools powered by FactSet’s metadata and research
- Streamline integration of models into advisors’ practice
- Customize models while maintaining “Rep as PM” status
- Populate subscribed models across other FactSet applications for model portfolio comparisons, analytics, and client reports



EFFORTLESSLY ADOPT COMPREHENSIBLE MODEL PORTFOLIOS



Search

through partners' Strategist Models



Review

portfolio, data, and statistics



Subscribe

to no strategist fee model portfolios



Customize

models while maintaining “Rep as PM”



Approve/Deny

strategist allocation updates

Contact FactSet to learn more at sales@factset.com.