

FAMILY WEALTH REPORT

Competitive intelligence for the
private wealth advisor



Informa Investment Solutions (IIS) is making **Capital Market Consultants'** (CMC) open-architecture investment-management advice an option for its AdvisorDecide financial-planning and M-Pact investment-consulting software.

The idea is to enhance IIS' financial-planning and investment-proposal systems by including capital-market assumptions -- something that's especially valuable to advisors who either work at firms that don't publish their own capital-market views or want to incorporate a broader selection of the investment universe, according to IIS.

New standard

CMC managing partner **Barry Mendelson** says that open-architecture -- access to non-proprietary investment-management products -- is the "new standard" of wealth management. "For IIS to have selected CMC's [open-architecture investment management] research shows [its] clear understanding of the needs of advisors and wealth-management firms," he adds.

As an optional module within AdvisorDecide and M-Pact, the advice content from CMC will include capital-market assumptions, profiling factors and a risk tolerance questionnaire, model portfolios that are diversified in terms of asset class and style, and customizable investment-policy statements.

IIS says the inclusion of CMC's advice brings it closer to its goal of becoming a single-source provider of "integrated wealth-management solutions."

CMC is a Milwaukee-based investment-management research and platform provider.

White Plains, NY.-based Informa Investment Solutions is a subsidiary of **Informa Financial Information**. -FWR