

## NEWS

### For immediate release

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## **Advisor Partners and Shareholders Service Group Provide Advisors with Cost-Effective Asset Allocation Portfolio Solution**

*Enables Advisors to Compete with Automated Investment Solutions*

WALNUT CREEK, Calif. And SAN DIEGO, Apr. 23, 2015 – [Advisor Partners](#), a turnkey asset management program, today announced an agreement with [Shareholders Service Group](#) (SSG), a brokerage and custodial firm for independent registered investment advisors, to provide advisors working with SSG a comprehensive, institutional-caliber global asset allocation product lineup to cater to the full spectrum of risk tolerances.

“In today’s investment environment, advisors are always looking for ways to efficiently serve the needs of all types of clients,” said Daniel S. Kern, CFA®, president and chief investment officer of Advisor Partners. “This solution will enable them to do just that, and will position them to effectively compete with the increasing number of automated services available to investors.”

Using a systematic approach to asset class research and portfolio rebalancing, Advisor Partners will help advisors working with SSG deliver professional portfolio management and full transparency to their clients. The solution includes a combination of active and passive ETF and mutual fund investments to maximize risk management benefits, while potentially enhancing returns. For cost-sensitive clients who prefer an index-only solution, Advisor Partners will provide a series of ETF-only portfolios. For high tax-bracket clients, tax-loss harvesting will be an integral aspect to the investment strategy.

Advisor Partners, which has been an asset manager on the SSG platform for several years, offers a range of portfolio solutions, enabling advisors to serve clients with increasingly sophisticated portfolio needs. The managed portfolios start at a minimum account size of \$10,000 with risk and objective characteristics for all client types. Existing client accounts will be held with SSG, eliminating the paperwork involved in transferring accounts.

“At SSG, our mission is to provide advisors with all of the tools they need to ensure excellent service for their clients,” said Peter Mangan, CEO. “Advisor Partners is a trusted resource with years of experience. This solution will enable advisors to expand their service model with their

existing clients and to reach prospective clients, ultimately helping them grow and scale their business operations to their clients' needs.”

More information is available by contacting Kris McCabe at Advisor Partners, (888) 265-2257 or Dan Skiles at Shareholders Service Group, (800) 380-7370.

## **ABOUT ADVISOR PARTNERS**

Founded in 2001, Advisor Partners is an investment advisory firm providing a broad range of sophisticated investment solutions to financial advisors, family offices and financial institutions. Daniel S. Kern, CFA®, joined the firm as President and Chief Investment Officer in 2011. Andrew Rudd, Ph.D., co-founder and former CEO of Barra, Inc., serves as chairman of Advisor Partners' investment committee. For more information, visit [www.AdvisorPartners.com](http://www.AdvisorPartners.com).

## **ABOUT SHAREHOLDERS SERVICE GROUP**

Shareholders Service Group (SSG), [www.ssginstitutional.com](http://www.ssginstitutional.com) provides brokerage and custodial services exclusively for independent registered investment advisors (RIAs). SSG provides a full range of brokerage and back office service and support with a robust technology platform, access to a full suite of investment vehicles, and a highly experienced service team that only serves independent RIAs. The company was founded in 2002, and currently serves over 1,400 advisory firms throughout the country. The management team began serving independent RIAs in the late 1980s.

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