DELIVERING LEADING PORTFOLIO MANAGEMENT SOLUTIONS

MAINSTREET ADVISORS

MS

Deliver a Comprehensive UMA Solution with Streamlined Operations and Scale Efficiency

A Turnkey Asset Management Program

MANAGER DUE-DILIGENCE
Access Manager Fact Sheets and Communication

TAX-EFFICIENT MANAGEMENT
Tax Managed Overlay and Direct Indexing Solutions

PERSONALIZED SOLUTIONS
Adherence To Client Specific Guidelines and Objectives

MARKETING & CONTENT SUPPORT
Providing Advisors and Clients Comprehensive Support

Empowering Advisors and Institutions with:

TOP-TIER INVESTMENT MANAGERS
A robust research and screening process delivers a curated lineup of high-conviction managers and strategies.

DISCRETIONARY OR ADVISORY FLEXIBILITY
Engage through a fully discretionary managed model or retain control with our advisory solution.

MULTI-ASSET DIVERSIFICATION
Access actively managed portfolios across equities, fixed income, and alternatives to build customized solutions.

PORTFOLIO IMPLEMENTATION TEAM
An experienced portfolio management team to assist in the transition of client portfolios and on-going monitoring and alignment to objectives

Why MainStreet Manager Select?

- FOCUS ON CORE COMPETENCIES AND DRIVING GROWTH
- INTEGRATED TECHNOLOGY FOR OPERATIONAL EFFICIENCY
- DELIVER BETTER CLIENT OUTCOMES
- SCALABILITY | FIDUCIARY ALIGNMENT | EFFICIENCY
- PRIVATELY BRANDED MARKETING & CLIENT CONTENT
- PROVIDES FOR MODEL, SMA OR UMA DELIVERY

MAINSTREET ADVISORS

Blending Qualitative and Quantitative Research to Build Diversified Portfolios Aligned with Each Client's Needs

PROPRIETARY MANAGER SCORE

Evaluating managers starts with our proprietary quantitative scoring tool that compares managers' performance and risk-adjusted statistics to their investment category peer group.

QUANTITATIVE ANALYSIS

Analyze managers' performance, portfolio construction and characteristics, risk factor exposure, and style consistency.



CLIENT PORTFOLIO MANAGEMENT

Tailor portfolios to clients' risk tolerance and financial objectives, with periodic rebalancing and opportunistic tax loss harvesting.

QUALITATIVE ANALYSIS

Meet with managers to assess their investment philosophy, process, and team.

ASSET ALLOCATION

Strategically adjust portfolio allocations across asset classes to capitalize on market opportunities and manage risk.

CONTINUOUS MONITORING

Manager model changes are monitored and delivered seamlessly through our proprietary technology. Each manager is scored based on performance, manager investment update meetings, and periodic in-depth reviews through our robust Committee meeting process.

Ready to grow your business?

Contact us today to discover how to add MSA Manager Select to your Investment Toolbox.

Scan to learn more

Give your clients a custom-curated investing experience. | 312.223.02770 | info@mainstreetadv.com

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