



ETF Model Solutions Recognized As Finalist For 2016 WealthManagement.com Awards

APPLETON, WI, June 21, 2016 -- ETF Model Solutions has been honored as a finalist for the WealthManagement.com Industry Awards in the “Asset Manager-ETF Strategist” category for 2016.

WealthManagement.com’s Awards Program recognizes firms that are contributing to advisor success in various categories. By acknowledging outstanding achievement in the industry, the Awards seek to inspire innovation and leadership among industry participants, creating an environment that will enable the industry to better support advisors in their roles as leaders to their clients and communities.

The Award for the ETF Strategists category seeks to acknowledge companies that have developed initiatives or programs that provide enhancements to an existing platform or improves advisors’ understanding, usage and portfolio management of ETF Strategists.

ETF Model Solutions® is creator of the rules-based [Endowment Index® calculated by Nasdaq OMX®](#). The Index represents the investable opportunity for advisers to portfolios that utilize the Endowment Investment Philosophy®. The rules-based index seeks to replicate the asset allocation of the average endowment fund using investable components (ETFs). The asset allocation is derived from data collected from over 800 college and university endowment funds.

Advisers are increasingly utilizing liquid alternatives within client portfolios. Factors contributing to this trend include greater access to non-traditional asset classes in ETP products, low bond market yields, and high equity valuations, among others. The increased use of liquid alts has made traditional equity and “60-40” indexes obsolete or inappropriate for multi-asset class client portfolios. The innovative, rules-based Endowment Index® seeks to fulfill this void and assist advisers with an objective, standardized measurement tool.

ETF Model Solutions is on the forefront of creating passive and active-passive portfolio management solutions to the advisory community within the context of the Endowment Investment Philosophy®, including solutions based on the innovative Endowment Index®. The firm is the investment manager for the [Endowment Multi Asset ETF Collective Investment Fund](#), a Collective Investment Trust (CUSIP 26923F105), which can be added as an investment option to most 401(k) and other retirement plans. The Fund employs a passive portfolio management strategy based on the Endowment Index®.

The Firm’s strategic [ETF-based models](#) can be utilized by advisers in individual or institutional client accounts or as investment options in retirement plans. The Firm’s risk-based Endowment models (Conservative, Moderate, and Aggressive) are intended as core investment solutions designed for clients with varying risk profiles. The Firm’s building block ETF models represent various asset classes, such as global equities or fixed income, hedge strategies, private equity and real assets. These bespoke models can be used by advisers to construct customized Liquid Endowment asset allocations.

ETF Model Solutions also offers a digital investment service that encapsulates the Endowment Investment Philosophy® directly to investors through the website, MyRoboAdviser.com.



More than 300 companies submitted nearly 400 nominations and 122 finalists were chosen from within 58 award categories. A panel of judges comprised of top names in the industry determined the finalists. The Wealth Management.com Awards will be presented at a gala reception on September 29 at the Mandarin Oriental Hotel in New York City. A portion of the proceeds from the awards event will be donated to the Foundation for Financial Planning.

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