

case study

ARCHER'S SOLUTION FOR AN EMERGING ASSET MANAGER

Archer works with a variety of asset managers, from large global managers to emerging boutique managers, to help them streamline operations and scale. Here's how we helped one emerging asset manager scale quickly to meet the growing demand for their product.

the challenge

A boutique asset manager servicing institutional and high-net-worth clients was seeing high demand for their strategies, which included single and dual contract accounts as well as model delivery. However, their existing technology created limitations that put excess stress on their operations team. As a result, they were unprepared to meet volume as their growth ramped.

The firm was looking to build on their growth and offer tax-optimized strategies on wealth platforms, but they knew they had to address their operational challenges first.

archer's solution

Archer provided immediate scale to support the demand for their new product. The firm was also able to demonstrate new efficiencies in support of tax-optimized and ESG strategies. In 48 months, they added 2,750 accounts with \$1.75 billion in AUM.

Looking ahead, the manager will continue expanding its offering to include products with multi-asset account structures.

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