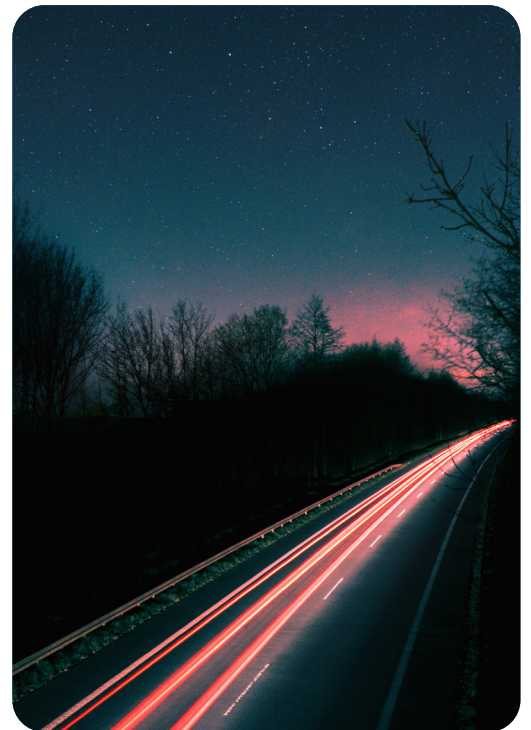


ARCHER'S SOLUTION FOR MULTI ASSET STRATEGIES

Deliver portfolios that span asset classes with Archer's technology enabled solution

To meet growing investor demand for outcome-focused investment solutions, asset managers are leveraging multi-sleeve accounts. These accounts combine different types of assets, such as equity, fixed income, ETFs and more, in a single custodian account that is allocated to achieve particular investment outcomes, such as growth, income or risk minimization.

A critical characteristic of multi-sleeve accounts is that they allow for performance tracking on both an overall basis and by asset class, enabling transparency and efficiency. While there has been continued investor appetite for such strategies, managers have struggled to bring multi-asset strategies to market due to the associated operational and reporting challenges.



operational efficiency across asset classes

A leader in helping investment managers deliver personalization at scale, Archer has expertise ensuring operational efficiency for multi-sleeve accounts, as well as the following personalized solutions:

- **Separately managed accounts**
- **Direct indexing**
- **Models of models**
- **Tax optimization**

ARCHER'S SOLUTION

Archer offers a unique solution that enables investment managers to launch multi-asset strategies using a multi-sleeve account where one custodial account includes multiple manager accounts. Archer's proprietary technology makes it easy for managers to build custom allocations and access custodial account and sleeve level performance, so managers can scale, while meeting customization and reporting needs.

For multi-sleeve accounts, we assign a specific allocation strategy that links several distinct models into a single custodian account. These accounts preserve the models' holdings, with cash and overlapping securities recorded and reconciled at the sleeve level. Each sleeve account is assigned a predetermined portion of the allocation strategies, and managers can move the cash from the overweighted sleeve(s) to the underweighted sleeve(s) through a simple transaction.

CUSTOMIZATION. In addition to being able to combine different strategies in a single custodian account, our technology makes it easy to optimize after-tax returns through a proprietary or third-party optimizer.

REPORTING. Custom reports are available at both the account and subaccount levels, making it easy for portfolio managers to view model performance as well as performance of underlying accounts.

SCALE. Archer's technology enables investment managers to handle large volumes of activity with no additional administrative tasks. Our platform is connected across all distribution channels for complete integration with third parties – custodians, administrators, brokers, and sponsor platforms.

for more information on
Archer's solutions,
please visit
archerims.com