



## Robo-Wholesaler: Redefining the Asset Manager and Advisor Relationship

01 April 2021 By: William Trout

Fee pressures and the ubiquity of information on funds and other investment product have put the onus on the asset management wholesaler to serve in an advisory capacity, rather than one focused on sales. Portfolio analytics tools enable the wholesaler to support the wealth management advisor before the client sale. As such, these tools offer wholesalers a means to increase their influence in the face of industry trends to commoditization.

### Key questions discussed in this report:

- How has the relationship between asset management wholesalers and advisors evolved, and how is it likely to develop going forward?
- What are the primary pressures facing asset managers and wholesalers and how can they navigate these pressures?
- What are the needs of advisors and how can wholesalers support them?
- How can digital tools support alignment between wholesalers and advisors and where are the opportunities to capture value?

**Companies Mentioned:** Adobe, Advicent, AssetMark, Bloomberg, Broadridge Financial Solutions, Capital Group, Charles River Development, Charles Schwab, CI Financial, Equisoft, Fidelity Investments, Franklin Templeton, HiddenLevers, JPMorgan Asset Management, LPL Financial, Morningstar, NexJ System, Northfield Information Services, Nuveen, Oracle, Orion Advisor Systems, Pershing, PIMCO, Raymond James, Redtail, Salesforce, T. Rowe Price, Tegra118, Vanguard, Vestmark, Voyant, WisdomTree, YChart

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[javelinstrategy.com](http://javelinstrategy.com)

[inquiry@javelinstrategy.com](mailto:inquiry@javelinstrategy.com)

925.225.9100