

# Which advisors had a smoother ride during COVID?

BlackRock®

## BlackRock wealth outsourcing platform

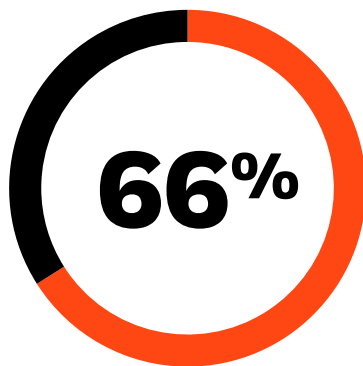
BlackRock asked more than 400 financial advisors how recent volatility impacted their practices.

What we learned was not surprising: advisors who use models and Separately Managed Accounts (SMAs) were able to experience a smoother ride for their practice and their clients.

From automated rebalancing to spending more time with clients, the benefits of wealth outsourcing are more important now than ever.

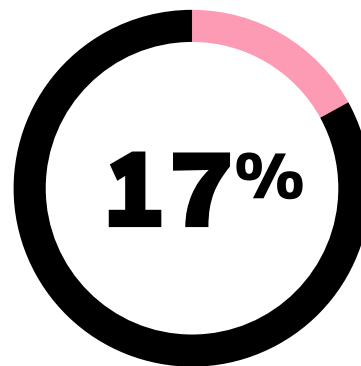
92%

of model and SMA users said that outsourcing improved their practice during COVID volatility



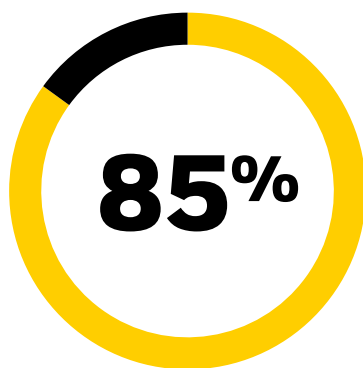
### More time with clients

66% of wealth outsourcers were able to spend most or all of their time with clients during COVID volatility.



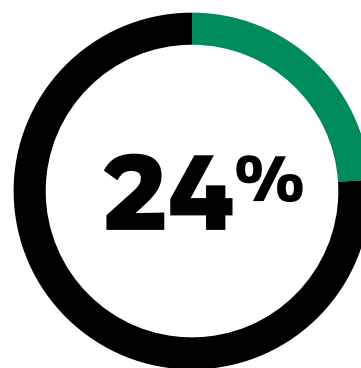
### Keeping clients invested

Wealth outsourcers were 17% more likely to help their clients stay the course.



### Growing their practice

85% of wealth outsourcers won new business during volatility, versus 69% who do not use models or SMAs.



### Managing portfolios

24% of advisors who manage their own portfolios did not rebalance at all during volatility.

## The future of wealth outsourcing

Today's environment has underscored the desire for advisors to partner with investment managers to provide a smoother ride to their clients.

# 74%

of advisors plan to increase their SMA and models usage over the next 12 months

## BlackRock is a partner to your practice

Entrusted with more than \$113 billion in models and SMA assets, we can partner with you no matter how you choose to manage your practice.

### Core

For advisors who prefer to focus on the tactical while relying on a well-run core strategy.

Choose from a full menu of models and SMAs offering various levels of cost efficiency and customization.

### Asset class

For advisors who want to outsource one asset class such as fixed income or equities.

Benefit from the tax efficiency of owning individual securities in an SMA or the cost efficiency of ETFs in models.

### Client segment

For advisors who want scalable solutions by client segment such as small accounts or high net worth accounts.

Rely on expert portfolio managers who understand the needs of clients across the wealth spectrum.

**Note:** Confirm product and platform availability at your firm.

## Want to know more?

blackrock.com | askblackrock@blackrock.com | 877-275-1255 (1-877-ASK-1BLK)

**Survey Methodology Overview:** In response to the COVID-19 induced volatility, during the week of 5/4/2020, BlackRock collected responses to a 15 question survey about wealth outsourcing (SMA & Models usage) experience and intentions from approximately 305 financial advisors across more than 10 independent and wire channel firms. The results above are a snapshot of the data collected as of 5/11/2020.

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