
Investnet launches platform for small but growing accounts

By Editor Test Mon, Dec 3, 2012

The program enables advisors to provide outsourced, diversified investment management for accounts as small as \$10,000. Advisors can use it to engage in multi-generational investing, the Chicago-based firm said in a release.

Investnet, Inc., the provider of wealth management platforms for investment advisors, has launched Investnet WealthBuilder, which it describes as “a new program designed to offer low-minimum investment accounts for advisors to target the emerging affluent and deepen their multi-generation client base.”

The program enables advisors to provide outsourced, diversified investment management for accounts as small as \$10,000. Advisors can use it to engage in multi-generational investing, the Chicago-based firm said in a release.

The program is designed to allow advisors to market managed portfolios of ETFs and mutual funds, fixed-income strategies, international indices, commodities and even currencies to a wider range of clients, including younger investors looking to begin their retirement savings, parents setting up accounts for children, college accounts, friends and family of existing clients as well as IRAs and UTMA's.

The Investnet WealthBuilder program offers four product suites: Russell Investments, Wilshire Associates, Vanguard and Investnet PMC.

The available portfolios and strategies include:

- Russell Model Strategies: 10 globally diversified, asset-allocated portfolios (five core and five tax-managed).
- Wilshire Allocation Builder Portfolios: Five strategic asset-allocation portfolios.
- Vanguard Core Portfolios: Six ETF-based models (conservative growth, aggressive growth and two each of moderate growth and capital preservation).
- The PMC Select Portfolios: Seven portfolios of varying risk profiles in strategic and dynamic styles, with an optional dynamic overlay.