
J.P. Morgan Adopts FundQuest's Advisor Gateway™ Platform

By Editor Test *Tue, Oct 13, 2009*

The program uses FundQuest's reporting, portfolio modeling, fund selection, and rebalancing technology.

J.P. Morgan's Broker Dealer Services business will begin using a new managed account program from FundQuest Incorporated, FundQuest announced. The program, Advisor Gateway, uses FundQuest's reporting, portfolio modeling, fund selection, and rebalancing technology. Other services include due diligence, training, back-office services and wholesaling support.

The managed account offerings on Advisor Gateway include unified managed accounts, mutual fund portfolios, income portfolios, and separately managed accounts. The new program also offers Advisor Choice, an advisor/client constructed portfolio using FundQuest asset allocation and performance reporting tools.

"Financial advisors who use J.P. Morgan Clearing Corporation's clearing and custodial capabilities will now have access to FundQuest's web-based proposal generation, portfolio diagnostics, performance reporting, and open architecture investment research capabilities," said FundQuest chairman and CEO James L. Fox.

Boston-based FundQuest, a provider of outsourced managed account solutions, has 180 advisory firms as clients and \$40 billion in assets under management in its combined US and European operations.

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