



BlackRock

CASE STUDY

Building Better Portfolios with BlackRock Advisor Center

How advisors can improve the client experience by enhancing portfolio analysis to guide conversations and decisions

Overview

To build successful firms, advisors need to attract and retain clients by demonstrating and delivering value. With powerful capabilities from BlackRock, advisors can analyze portfolios, prospect new clients, and host repeatable planning conversations.

Conveniently integrated into your Envestnet desktop, BlackRock Advisor Center can help you streamline your workflow, gain insights to customize portfolios, and create client proposals.

“With Advisor Center, we’re having more productive client meetings about investment decisions. From uploading a portfolio to analyzing it and presenting it to a prospect or client, Advisor Center makes our job easier and our conversations more meaningful.”

A Set of Integrated Capabilities that Improve Portfolio Decision Making and Reporting

By providing advisors with an integrated set of capabilities, Advisor Center deepens client relationships by making it easy to upload portfolios, analyze them, and create reports to share with clients:

PORTFOLIO ANALYSIS

With 360° Evaluator, you can analyze your portfolios with custom insights tailored to each portfolio. 360° Evaluator objectively analyzes portfolios across key attributes, including performance, risk, and cost. After you run the analysis, you can assess the health of individual funds across your book with the Investment Quality tool.

STRESS TESTING

With Scenario Tester, you can quickly analyze the sensitivity of a portfolio to changes in the market environment by applying different risk scenarios. Stress test portfolios against over 30 market scenarios, including common client concerns and tangible, historical events, to help explain and set expectations for how they may react.

TAX EVALUATION

BlackRock's Tax Evaluator aggregates and analyzes the tax impact of capital gains across all your client portfolios, saving you the time and work of hunting down this important information. To help clients keep more of what they earn, you can consider short-term and long-term strategies to unlock potential tax savings across client portfolios.

REPORTING

With Advisor Center's Client Report, you can easily communicate investment ideas to clients. The report contains highlights of portfolio holdings, analytics, insights, and more, making it easier to discuss risk with clients in ways that they can understand. The report also provides a framework for client meetings, allowing you to have more meaningful conversations.

Results

By using Advisor Center, advisors can:

DEEPEN CLIENT RELATIONSHIPS

Improve the client experience by enhancing portfolio analysis and presenting decisions and options to clients in a way they can understand.

ENHANCE PORTFOLIO ANALYSIS

Objectively analyze portfolios across key attributes. Then, assess the health of individual funds across a book with Investment Quality.

IMPROVE THE CLIENT CONVERSATION

Share client-friendly reports to guide conversations. Show clients where a portfolio stands today, and explain the decisions you've helped your clients make.

“Clients are always concerned about risk and taxes. Advisor Center helps us take emotion out of the conversation, giving clients confidence in their plans and their ability to achieve their financial goals.”



With deep experience helping over 40 independent, growth-oriented RIAs evaluate their technology needs, the LibertyFi team is the industry leader in middle-office consulting services.

Learn more: www.libertyfi.com.