

AdvisorIntelligence

iM
Global
Partner

Institutional-Quality Research for Investment Professionals

Advisor Intelligence is a digital investment, globally-researched, communication engagement platform designed for financial advisors, portfolio allocators and investors.

Advisor Intelligence leverages the global asset management network of iM Global Partner and select research alliance partners.

Whether advisors are coming to us to fully outsource their investment decision-making or as a complement to their own work, our secured web-based service allows users to access and implement our research and materials in a flexible way that meets the unique needs of their practice.

How AdvisorIntelligence Can Benefit Your Practice :

Research and Recommended Investment Solutions-



Confidently rely on Mutual Fund or ETF recommendations as AdvisorIntelligence draws on our global research team's expertise across all asset classes. Leveraging our research and extensive due diligence allows you to validate and feel more secure with your investment decision making for clients.

- Third party investment and real time market updates
- Updated Mutual Fund & ETF recommendations across all asset classes
- Due Diligence reports to give you understanding on our thought process

Thoughtfully Designed & Diversified Model Portfolios-



Our portfolio strategies are curated, pre-built portfolios based on four decades of research, due diligence, and implementation of best ideas, third-party managers in addition to our iMGP partner firms.

- ESG Allocations
- Actively Managed Allocations
- Index Allocations

Personalized Content & Client Communications-



Advisorintelligence understands that not every Financial Planning practice is the same. Our content and your communications are tailored to your practice and client needs. We welcome you to leverage our expertise in the wealth management industry.

- Timely insights to markets and investment trends.
- Client ready (white label) communications to use with your clients.
- Quarterly letter, market updates and model summaries.

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Who We Are

iM Global Partner (iMGP) is a worldwide asset management network. Based on in-depth research centered on people, iMGP develops long-term partnerships with talented and independent asset management companies through direct capital ownership. iMGP is present in 16 locations across Europe and the United States and provides its clients with access to the best investment strategies of its partners. In addition to our asset management network, we have developed collaborations with other excellent asset management firms such as DoubleLine, Guggenheim Investments and more to benefit our AdvisorIntelligence clients.

How Do Investment Professionals Work with iM Global Partner

As financial advisors ourselves through our wealth management group, we understand the needs and issues other investment professionals face. There are many resources available to advisors, but very few offer well-thought-out advice and high-quality information that is of practical use. We believe we can do better.

iMGP Portfolio Strategies

iMGP Portfolio Strategies offers sophisticated turnkey active and index-based portfolios through third-party investment management platforms. They are available to individual investors through investment professionals only.

iMGP Funds

iMGP Funds offers proprietary sub-advised mutual funds and ETFs that invest in compelling ideas from quality portfolio managers. We seek to find distinct strategies in asset classes that offer the best opportunity to add value through active management and high active share. The strategies that the fund family brings to the market are not available through any other mutual fund.

Note: For discretionary use by investment professionals. This document is provided by iM Global Partner Fund Management, LLC ("iMGPFM") for informational purposes only and no statement is to be construed as a solicitation or offer to buy or sell a security, or the rendering of personalized investment advice. There is no agreement or understanding that iMGPFM will provide individual advice to any investor or advisory client in receipt of this document. For additional information about iMGPFM, please consult the Firm's Form ADV disclosure documents, the most recent versions of which are available on the SEC's Investment Adviser Public Disclosure website (adviserinfo.sec.gov) and may otherwise be made available upon written request.