

SMA 101



GETTING STARTED WITH SEPARATELY MANAGED ACCOUNTS

A New Way of Growing Your Business

The rapid growth of Separately Managed Accounts (SMAs) continues with assets topping \$500 billion last year industry-wide – an increase of almost 29 percent in the past 12 months. As more firms and advisors realize the benefits of being on the same side of the table as their clients, demand for SMA guidance increases. The question we keep hearing is how do I get started with separately managed accounts?

Getting Started With SMAs

The Money Management Institute (MMI), the national organization for the managed account industry, offers the SMA 101 Kit. The kit gives your team an understanding of the managed account process and how to run a more client centered business, along with the blueprints and tools to integrate separate accounts into your plan.

Who Benefits from the SMA 101 Kit?

The SMA 101 kit is for managers, financial advisors, bank consultants, and independent advisors looking to grow their business with SMAs. It provides a step-by-step process and you will find answers to:

- *Why have SMAs become so important for my clients' financial planning?*
- *How have top advisors integrated SMAs into their practice?*
- *What is the disciplined investment process and how does it work?*
- *What are the three steps to get started today?*
- *How can I measure my success and stay ahead of the competition?*
- *Who are the largest SMA sponsors?*
- *What is the history of SMAs and who were its founders?*

Get Started and Order SMA 101 For Your Team Today

Order your kits on the MMI website at www.moneyinstitute.com by clicking on the SMA 101 box on the home page or by calling MMI at (202) 347-3858. The cost for the kit is \$200 (a 10% discount will apply to MMI members---for bulk order discounts call MMI directly).

Jump Start Your Team with A Professional Consultant

A 30-minute conference call with Wilke and Associates is included in the cost of the SMA 101 kit. Wilke and Associates is a leading consulting and training firm specializing in helping advisors define and grow their practice with separately managed accounts. A Wilke professional will guide your team through the SMA 101 program and show you the best ways to maximize the kit.

The SMA industry is entering a significant period of growth and the **SMA 101 Kit** gives you the foundation to capture a greater share of client assets:

- ***The SMA 101 Overview Guide*** contains a market overview, the opportunities for growing your business, and the three key steps to get started.
- ***Legacy: The History of Separately Managed Accounts*** gives the history of investment management consulting, its leaders, and how it has grown to where it is today.
- ***The Managed Account Handbook: How to Build Your Financial Advisory Practice Using Separately Managed Accounts*** discusses the process of adding SMAs to your practice to keep your best clients and attract appropriate new clients.

The Money Management Institute

202-347-3858

www.MoneyInstitute.com

