

Model Wealth Portfolios Awarded Advisory Solutions Product of the Year

Advisory Platform Honored for Innovation That Drives Industry Growth



“Our receipt of this award reflects the scale-driven platform innovation that helps our advisors focus on the unique and diverse investment needs of their clients.”

– John Moninger
Executive Vice President
LPL Financial



Model Wealth Portfolios (MWP) has been awarded the Advisory Solutions Product of the Year by Money Management Institute (MMI), the leading national organization for the advisory solutions industry. This prestigious industry award is granted to the firms that launched the most innovative advisory platform that contributed to the growth of the industry. This year, LPL Financial was selected out of nearly 30 nominees, all of which participated in a competitive selection process.

First launched in 2008, Model Wealth Portfolios offers client-centric theme-based investment portfolios for a broad range of investor preferences including, among many others, risk aware, income generation and tax conscious investing.

Each portfolio combines professionally designed asset allocation strategies and disciplined mutual fund and Exchange Traded Product (ETP) selections that are aligned with the unique investment goals of each advisor’s client. Additionally, the MWP platform features strategies from LPL Financial Research and three industry-leading ETF strategists including BlackRock, Cougar Global Investments and Quantitative Advantage. Each of the strategists brings unique investment philosophies, knowledge and expertise to MWP, enabling advisors to efficiently manage the asset allocation, investment selection and implementation process.

The MWP platform also offers financial advisors discretion over all aspects of portfolio model construction and the management process, as well as significantly greater efficiency in how they operate their practices through an asset oversight.

John Moninger, LPL Financial Executive Vice President of Advisory and Brokerage Consulting Services, said, “We are grateful to Money Management Institute for their recognition of our MWP platform. The role this platform has played in the industry is due to the collaborative approach of our asset management partners, and our advisors, who have helped drive the ideas around its development. Our receipt of this award reflects the scale-driven platform innovation that helps our advisors focus on the unique and diverse investment needs of their clients.”

Christopher Davis, President of Money Management Institute, said, “We congratulate LPL Financial on their receipt of the Advisory Solutions Product of the Year. Advisory platform innovation that directly supports greater efficiency in asset management is central to the continued growth of our industry. We are proud to support and recognize the leading companies who are building the top platforms in this space.”

One of the reasons that LPL Financial advisors choose independence with LPL Financial is the opportunity to utilize innovative investment strategies, such as MWP, that put the focus where it should be; the client. If you have any questions, please contact your LPL Financial advisor.

Investing in mutual funds and exchange traded products are subject to the risks of their underlying investment holdings including possible loss of principle. Investments in specialized industry sectors have additional risks, which are outlined in the prospectus. An investment in ETPs involves additional risks: not diversified, the risks of price volatility, competitive industry pressure, international political and economic developments, possible trading halts, and Index tracking error.