

Winslow Capital Group, LLC

Winslow Capital Group provides independent advice on wealth management platform technologies.

The wealth management industry is increasingly dependent on technology to achieve scale. Working in concert with J. H. McLaughlin & Co., Winslow Capital Group helps wealth management organizations build scale into the business model and customize the client experience by rationally linking technology to support, define, and adopt a more efficient wealth management business process and in turn, a more competitive and sustainable business model.

The wealth management industry is in process of making a cultural transition to an “open architecture” platform. Implementation models include a wide range and mix of options including proprietary disciplines, Separately Managed Account platforms ("SMA"), overlay-models based approaches, Unified Account Management environments ("UMA"), and Unified Managed Household Accounts ("UMH").

Winslow Capital Group is the leading independent consultant for banks, investment advisers, and broker-dealers seeking to determine an optimal method of execution regarding open architecture. Winslow Capital Group provides independent counsel to make the right decisions as well as avoid the costly mistakes of implementing a poor choice. We design customized solutions regarding open architecture and can help a client understand the implications of related topics including, vendor selection; integration of affiliated business lines; streamlining systems of record; use of bank and brokerage custody; internal and external reporting; adoption; Turn-Key-Asset-Management-Platforms (TAMP); and Point Solution Models.

Winslow Capital Group can help you with the following:

- navigating the critical distinctions between and implications of SMA / UMA / Overlay / UMH / TAMPs / Point Solution Models;
- providing competitive price analysis of and support negotiation with your vendor(s);
- making an informed decision on "unbundled versus bundled" service providers;
- leading a discussion about the ongoing evolution of the industry and the impact on your decisions;
- evaluating and selecting manager due diligence, selection, and monitoring options;
- evaluating and selecting performance & attribution options;
- positioning products and services relative to existing, proprietary offerings;
- working with your existing staff to correctly incorporate and internally position an Open Architecture / SMA / UMA / Overlay / UMH offering.