

# EVO WEALTH CONSULTING

## INVESTMENT PROCESS ENGAGEMENT

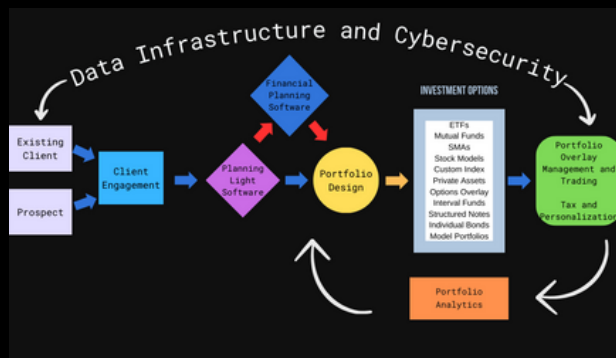


Mike Casciano began his career as a financial advisor in 2005 and joined BlackRock as a wholesaler from 2007-2015. He then helped launch BlackRock’s advisor consulting initiative called Portfolio Solutions.



In 2021 Mike was asked to lead BlackRock’s tech partnership with 55ip for custom and off-the-shelf model portfolios for RIAs. In 2022 he created models and custom index solutions at Principal, partnering with Smartleaf AM for sub-advised overlay management.

In September 2023, Mike founded EVO Wealth Consulting to fill an unmet need of helping RIAs understand new technology, solutions, and process enhancements to deliver a differentiated and scalable client experience.



### FOUR CATEGORIES OF INNOVATION

| Data, Cybersecurity and Cybercompliance | Marketing, Engagement, Planning, Portfolio Design | Portfolio Implementation and Risk Analysis | Investment Solutions |
|---|---|--|----------------------|
| Buckler                                 | Fynancial asset+map                               | SAM Wealth Management                      | VettaFi              |
| FCI                                     | nebowealth  | ALLOCATERITE                               | Syntax               |
| Dispatch                                | VRGL  | kwant                                      | PROTEUS              |
| JIFFY.ai                                | fp alpha  | Jacobi                                     | IMTC                 |
|   | Vanilla   |  | HALO                 |
|   | Jump  |  |                      |

EVO offers 30-minute no cost consultations for CIO’s to:


- Understand the firm’s current portfolio management process
- Determine short and long-term goals
- Provide updates on solution and process innovations
- Offer best practices or strategies similar firms have adopted
- Connect your firm with any set of solution providers where there is interest

# COMMON AREAS OF INTEREST


Model Portfolio Creation  
 Direct Index  
 Custom Index  
 Private Asset Incorporation  
 Individual Municipal Bonds  
 Structured Products  
 Options Overlay Strategies  
 Illiquid Assets  
 Proprietary Strategies

Portfolio Trading/ Rebalancing  
 Overlay Management  
 Automated Tax Management  
 Tax Transition  
 Custom Portfolio Design  
 Linking Planning Software to  
 Portfolio Construction  
 Custom Risk Analytics  
 Custom Scenario Analysis

## ARTICLES



**The Rise of Custom Indexes**  
 rethinking65.com



**'Tech Debt' and Fear Limit Many Practices**  
 rethinking65.com

## 90 SECOND CONTENT SERIES



**1:30**

**DONE IN 90 SECONDS**  
 MIKE CASCIANO  
 FINANCIAL PLANNING TO  
 PORTFOLIO DESIGN

**MIKE CASCIANO**

President

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## SOLUTION INTERVIEWS

|  |  |
|--|--|
|  <p><b>3 Good Questions</b></p> <p><b>PATRIC GLASSELL</b><br/>             Head of Growth<br/>             Kwantl</p> <p><b>kwantl</b><br/>             Risk Analytics</p>                            |  <p><b>3 Good Questions</b></p> <p><b>PARKER ENCE</b><br/>             CEO<br/>             Jump</p> <p><b>Jump</b><br/>             AI Assistant</p>                                |
|  <p><b>3 Good Questions</b></p> <p><b>ADAM SCULLY-POWER</b><br/>             Practice Solutions Director<br/>             Nebo Wealth</p> <p><b>nebowealth</b><br/>             Portfolio Design</p> |  <p><b>3 Good Questions</b></p> <p><b>SCOTT SMITH</b><br/>             Chief Executive Officer<br/>             Buckler</p> <p><b>Buckler</b><br/>             Cyber Compliance</p> |

