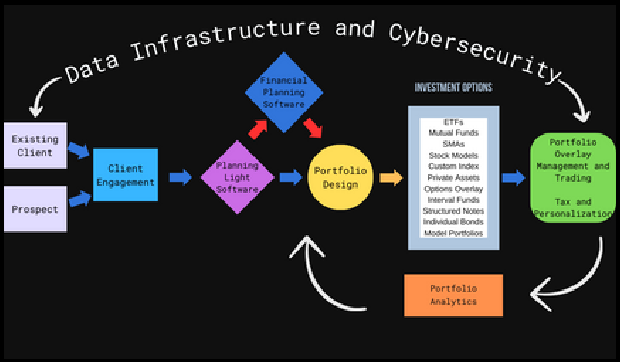
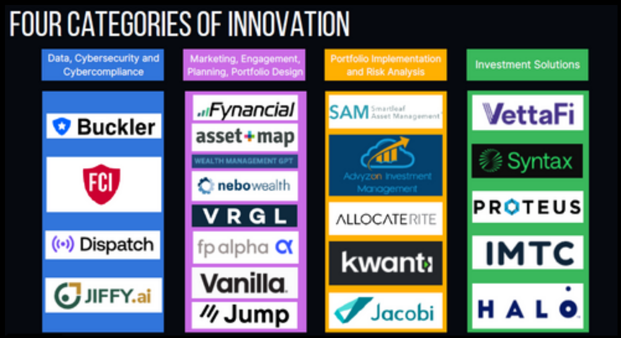
EVO WEALTH CONSULTING
INVESTMENT PROCESS ENGAGEMENT

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.





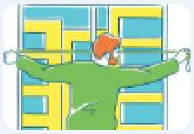
EVO offers 30-minute no cost consultations for CIO's to:

- 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

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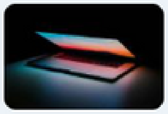

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SOLUTION INTERVIEWS

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