



MIKE CASCIANO
EVO WEALTH CONSULTING, LLC

WEALTH MANAGER INTRODUCTION
Q3 2024

RIA WEALTH MANAGEMENT IS AT A CROSSROADS



Decade + bull market and ample liquidity powered an RIA M+A boom driving valuations from 8-12 to 20-30 times trailing 12-month cash flows.



Higher rates, and lower prospects for market returns are putting pressure on growth and profit goals of RIA aggregators from PE ownership. This means competition is about to get real.



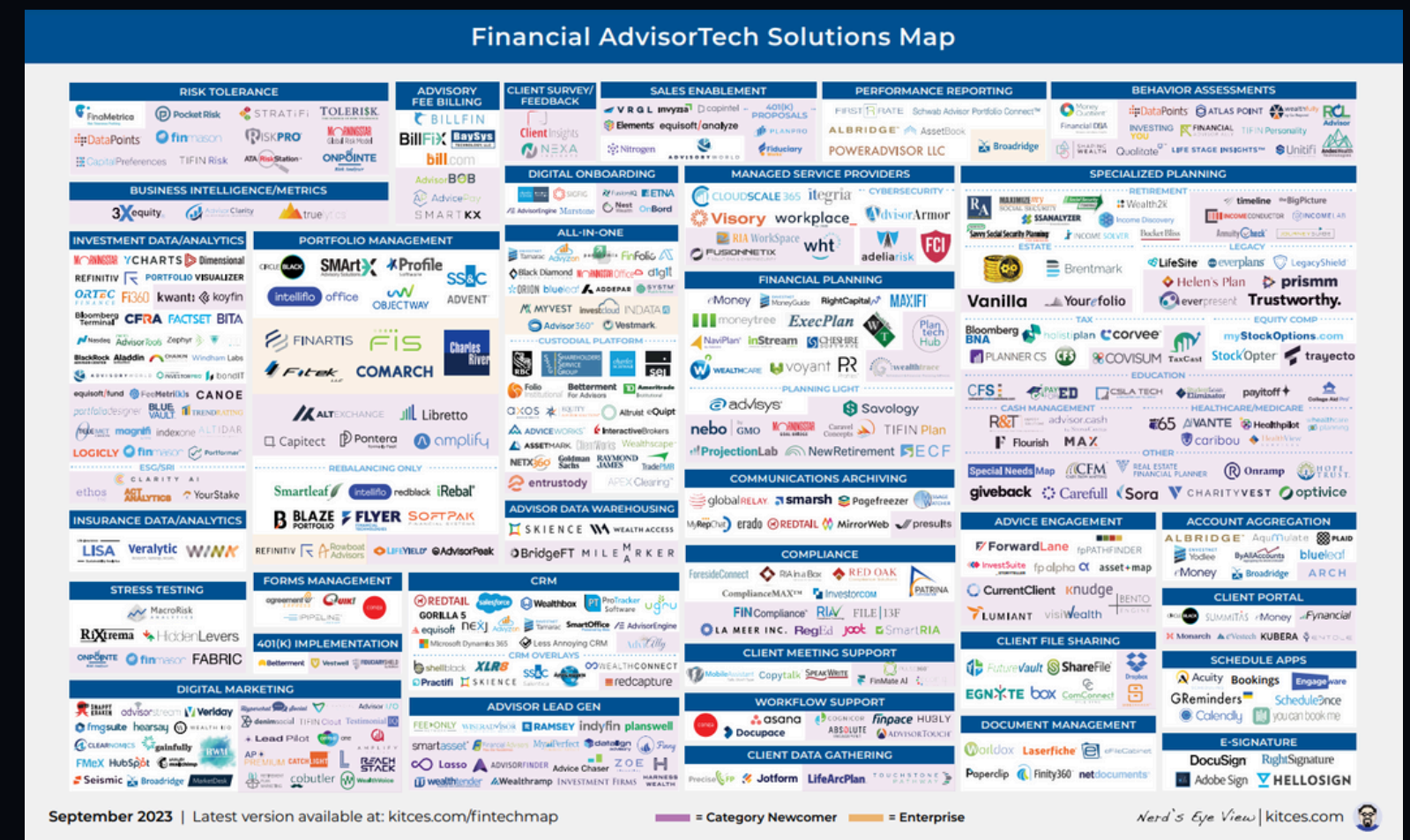
Welcome to the Jungle, an impactful 2023 white paper, declared a turning point that successful firms must integrate acquisitions into a scalable infrastructure that powers organic growth.

Access white paper at www.dpripro.com

Technology is evolving at a pace exceeding Wealth Managers' ability to implement and adopt.

- Less than 10% of advisors feel they have the needed tech solutions ¹
- Only 64% of purchased technology is being used ¹
- Only 12% of technology is being used to it's full capabilities ²

Michael Kitces' AdvisorTech Map
A Constantly Evolving, Complex Landscape



1 Study by Orion
2 Study by Michael Kitces

PROBLEM

Most RIA firms do not have the capacity, expertise or infrastructure to easily adopt and implement game changing technology

INORGANIC/
ORGANIC
GROWTH

1

Inorganic growth produces a collection of unique advisor teams and processes that do not benefit from a central, scalable solution. Organic growth is in the low single digits for the channel.

MANUAL
SERVICE
MODEL

2

Advisors have managed assets for decades. This often involves spread sheets and highly manual processes that limit new client acquisition and organic growth.

CAPACITY AND
EXPERTISE

3

Firms don't have the time or expertise to vet the emerging technology solutions to understand the pros, cons and integration challenges of adoption.

DIFFERENT-
IATION

4

The value proposition firms deliver to clients and the approach to planning and investment management lacks differentiation.

WHO IS HELPING TODAY?

Traditional Consultants? Asset Managers? Tech Providers? Outsourcing?

Consultants



Specialty focused,
not holistic

Expensive

Short-term project
based



Product first sales
approach

BD/ Wire focus, not
RIA

Expensive, inefficient
solutions



Solution focused

Limited support
infrastructure

Lack holistic
practice experience



High cost

Limited control

Not differentiated

EVO DELIVERS ACROSS ALL FOUR RESOURCES

EVO fills an unmet need as a holistic solution partner for growth-focused \$1B+ RIAs



Holistic Strategy and Tech Consulting

Define, Determine, Implement, Activate Service Model

Scalable, Differentiated, Tech-Enabled Process



Cost-Efficient, White Label Investment Solutions

Custom Index
Private Assets
Individual Bonds
Structured Notes
Options Overlay



Partner Approach Works with Tech Solutions to Drive Adoption, Implementation and Activation for RIAs

Facilitate Third-Party Solutions Compatibility



Move from Outsourced to Co-sourced Powered by Technology

Partnerships with CTO/COO Specialists to Assist with Data Migration and Complex Integrations

SIMPLE 4 STEP PROCESS

EVO can lower the total cost of operations, improve margins, and increase scale/ capacity

EVO provides investment solutions that can be white labeled to create new sources of revenue

EVO offers discounted fees for third party technology through relationship/ partner pricing

EVO creates custom playbooks for each wealth manager to drive growth and advisor adoption



Define

Challenges and Desired State



Determine

Bottlenecks, chokepoints and manual processes that restrict goals



Implement

Create a strategy to implement advisor technology and investment solutions into existing platform



Activate

Create educational playbook to make adoption of new client service model easy and desired

EDUCATIONAL CONTENT - WEALTH TECH SOLUTIONS GUIDE

EVO Announces Partnership with 22 Leading Tech Solutions August 6th

- Generate joint educational content and webinars
- Show how solutions work within existing infrastructure
- Launching industry first partner demo portal for wealth managers to view solutions in September

FOUR CATEGORIES OF INNOVATION

Data, Cybersecurity and Cybercompliance	Marketing, Client Engagement, Planning	Portfolio Design, Implementation, Analysis	Investment Solutions

EINPRESSWIRE

EVO Wealth Consulting Launches Wealth Technology Solution Guide with 22 Industry Leaders

EVO Wealth Consulting helps growth-focused wealth managers navigate the expanding landscape of wealth technology.

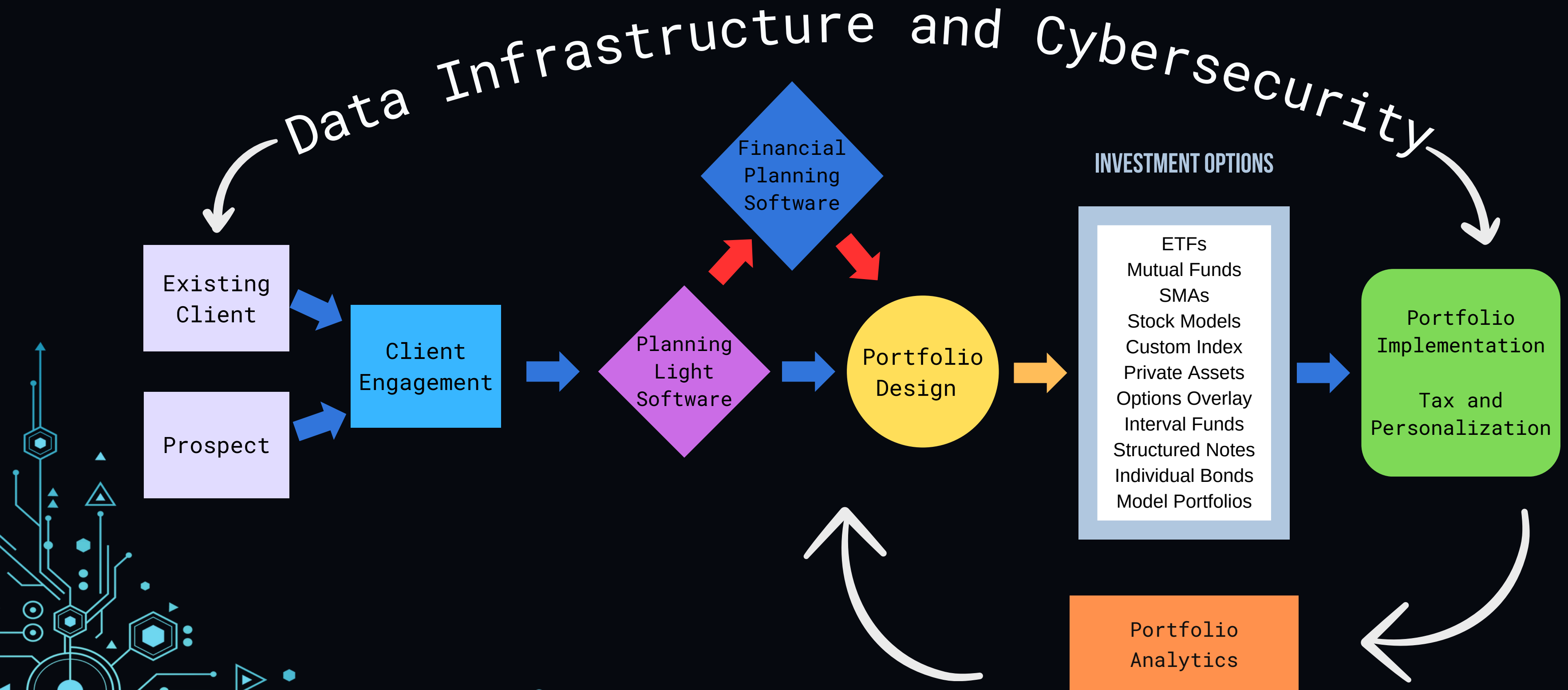
NEW HOPE, PA, UNITED STATES, August 6, 2024 /EINPresswire.com/ -- [EVO Wealth Consulting](#) (EVO), is proud to introduce the Wealth Technology Solution Guide, created in partnership with 22 leading wealth technology providers. This initiative aims to help financial advisors, Registered Investment Advisory (RIA) firms, and broker-dealers navigate the expanding landscape of wealth technology.

EVO's new guide offers clear, concise educational content, explaining the functions and implementation of various solutions within advisory firms. The content also addresses the challenges of adopting new technologies and integrating them into existing processes.

EVO WEALTH TECHNOLOGY SOLUTION GUIDE

EVO Has Partnered with 22 Leading Wealth Technology Solutions Across the Technology Stack

GOAL: IMPLEMENT A SCALABLE AND DIFFERENTIATED SOLUTION



EVO IS A TRUE STRATEGIC PARTNER

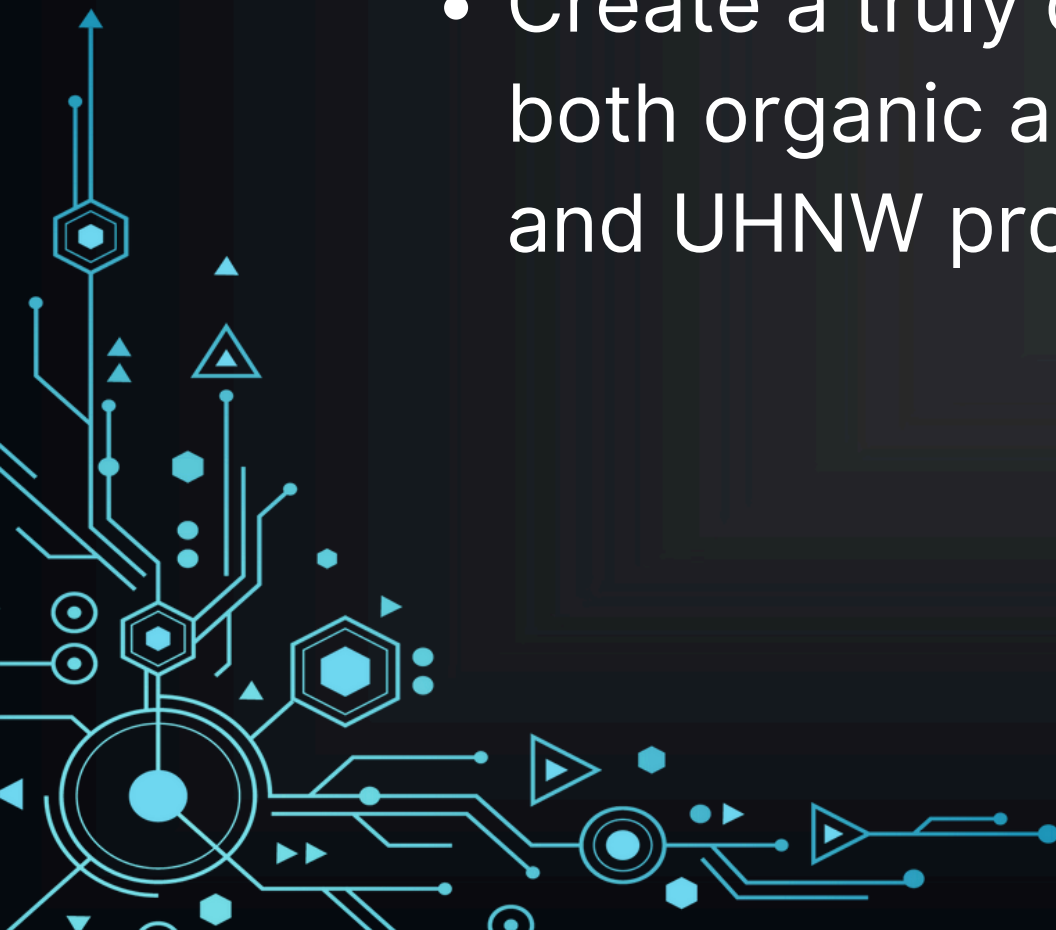
3 Ways to Work with EVO as a Long-Term Strategic Partner

- Traditional Consulting Fees: Monthly rate for strategy and technology consulting or a per project fee
- Offset consulting fees by incorporating low-cost, white label investment strategies built specifically for use within an automated investment process
- Offset consulting fees through subsidization by select technology partners



BENEFITS

- Open architecture consulting approach allows for use of any investment or technology solution, full transparency and no conflicts of interest
- Reduce the total cost of portfolios for clients, generate additional revenue through proprietary investment solutions, add game changing technology
- Create a truly differentiated and scalable advisor/ client experience to fuel both organic and inorganic growth, and become more competitive for HNW and UHNW prospects/ clients



SERVICES

EVO Helps Wealth Managers



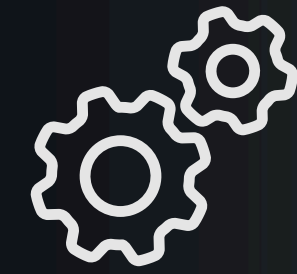
Conduct Due Diligence

Understand and evaluate solutions across the entire tech stack and implement scalable processes



Automate Critical Tasks

Utilize technology to automate time-consuming but critical tasks that limit advisor capacity



Grow and Scale

Increase advisor count, AUM, and HNW clients organically and inorganically



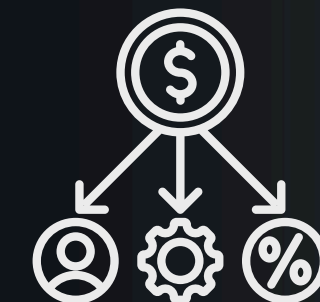
Pay for Technology

Subsidize the costs of new technology from asset management revenue



Offer Proprietary Products

White label custom indexes, private assets, bonds, options, and structured notes



Obtain Discounted Fees

Wealth Technology Partners offer discounted pricing through EVO by reducing cost of client acquisition



HOLISTIC CONSULTING
PARTNER APPROACH
UNRIVALED EXPERTISE

MIKE CASCIANO
PRESIDENT

Financial Advisor
Wholesaler
Portfolio Consultant
Fintech Strategist
Model Strategist
Platform Integration
Sales Strategy & Training



- 2005-2007 Financial Advisor - New England Securities/ Creative Financial
- 2007-2021 BlackRock - Wholesaler, Portfolio Consulting, Fintech Model Delivery Partnership (55ip)
- 2021-2023 Principal AM - Head of Model Strategy, Portfolio Consulting and Fintech Partnerships (Smartleaf AM, YieldX, Jacobi)

LEARN MORE

Contact Mike Casciano

E-mail: mike@evo-wealth.com

Mobile: 484-764-2387

Schedule: <https://calendly.com/mike-evo>

Website: <https://evo-wealth.com>

