




CUSTOM TRADING

OUTSOURCE YOUR MODEL MANAGEMENT AND TRADING

The Financial Advocates' Custom Trading program is designed for advisors who want to outsource model management and trading while retaining the investment oversight and construction.

Our trading service is a boutique solution that is customized to an advisor's specific needs. It is ideally suited for advisors who wish to retain the ability to customize their model offerings, but want to be systematic in their approach.

WHAT TO EXPECT

-  Significantly reduced account setup time
-  Personalized approach to the custom models
-  No need to hire a full or part-time employee

OUR SERVICES

- ✓ Model construction and methodology
- ✓ Model management
- ✓ Re-balancing of accounts
- ✓ Risk tolerance assessment
- ✓ Tax-loss harvesting
- ✓ Enhanced trading
- ✓ Third-party strategic consultations are available as needed, when qualified