

## Folio Institutional's Model Manager Exchange Adds Morningstar Managed Portfolios ETF and Mutual Fund Models

**MCLEAN, VA, July 7, 2016** – [Folio Institutional](#) has added 31 Morningstar<sup>®</sup> Managed Portfolios<sup>SM</sup> ETF and mutual fund models to its [Model Manager Exchange \(MMX\)](#). Folio provides MMX, a network of third-party investment models, to registered investment advisors (RIAs) who seek more efficient, cost-effective asset management solutions.

Benefits from MMX include:

- No client minimum account requirement. (Mutual funds may have their own minimums.)
- Access to more than 80 investment managers and nearly 400 model portfolio strategies.
- Ability to subscribe to any number of MMX models.
- Simultaneously manage thousands of client accounts, thanks to Folio's trading technology.
- Use models "as is" or customize them to meet clients' unique needs.
- Direct access to investment managers to license and discuss models.

"Today, RIAs demand services that streamline their business, reduce costs and offer possible solutions to fiduciary duty rules. Model Manager Exchange helps make this possible," said [Greg Vigrass](#), president of Folio Institutional. "We are excited about the addition of Morningstar Managed Portfolios to MMX. This is one of the many ways we seek to contribute to an advisor's business growth, innovation and client service."

MMX also empowers investment managers to broaden their reach to Folio's RIA clients. Brand name and start-up investment managers make their models available through MMX.

"Our managed portfolios are designed to be part of a long-term investing plan and are built with investors' needs in mind. These strategies help advisors' practices be more efficient, so they can spend more time providing comprehensive financial planning services to investors," said Daniel Needham, president and CIO of Morningstar's Investment Management group. "Morningstar's mission centers on helping investors reach their financial goals, and we're pleased to make our managed portfolios available to Folio Institutional clients through the Model Manager Exchange."

"Folio Institutional's models and rebalancing tools are a game changer for us," said Vance Howard, CEO of Howard Capital, a SEC-registered RIA that uses models offered through MMX. "Using Folio Institutional's Model Manager Exchange, Howard Capital is able to run 20 different investing strategies, ranging from very high to very low risk. We can also subscribe our clients to multiple strategies, in one account."

Morningstar's models are built to meet a range of investment strategies, time horizons and risk profiles:

- Five mutual fund-based asset allocation portfolios designed for tax-deferred accounts
- Five mutual fund-based asset allocation portfolios designed for tax-sensitive accounts
- Five mutual fund-and-ETF-based asset allocation portfolios designed for tax-deferred accounts
- Five mutual fund-and-ETF-based asset allocation portfolios designed for tax-sensitive accounts
- Five ETF-based asset allocation portfolios
- Four retirement income portfolios
- One absolute return portfolio
- One multi-asset high income portfolio

To learn more about Folio Institutional's Model Manager Exchange and its other portfolio management tools, [please contact Folio Institutional](#).

**About Folio Institutional®**

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**About Morningstar® Managed Portfolios<sup>SM</sup>**

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