

For Financial Advisors: How a TAMP Could Benefit Your Book

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A TAMP, or Turnkey Asset Management Program, is a mixture of software and service that focuses on researching and allocating investments. TAMPs are considered “investment-only” models, as they do not provide full-service offerings like retirement or financial planning but rather focus on researching and trading.

What Are TAMPs?

TAMPs allocate assets into pre-defined investment models based upon the present productivity and outlook of the investment. With the goal of diversifying assets, TAMPs research investment options such as exchange-traded funds (ETFs), mutual funds and stocks to better understand current performance. The TAMP would then trade assets and rebalance the portfolio based on the research. Many Financial Advisors serve as their own TAMPs but find it challenging to balance client relationships with the time-consuming research that goes into trading.

How Are TAMPs Beneficial for Advisors?

TAMPs allow advisors to spend less time researching and trading and more time interacting with clients. This potentially saves a large amount of time for advisors who struggle to find the balance between advising and research.

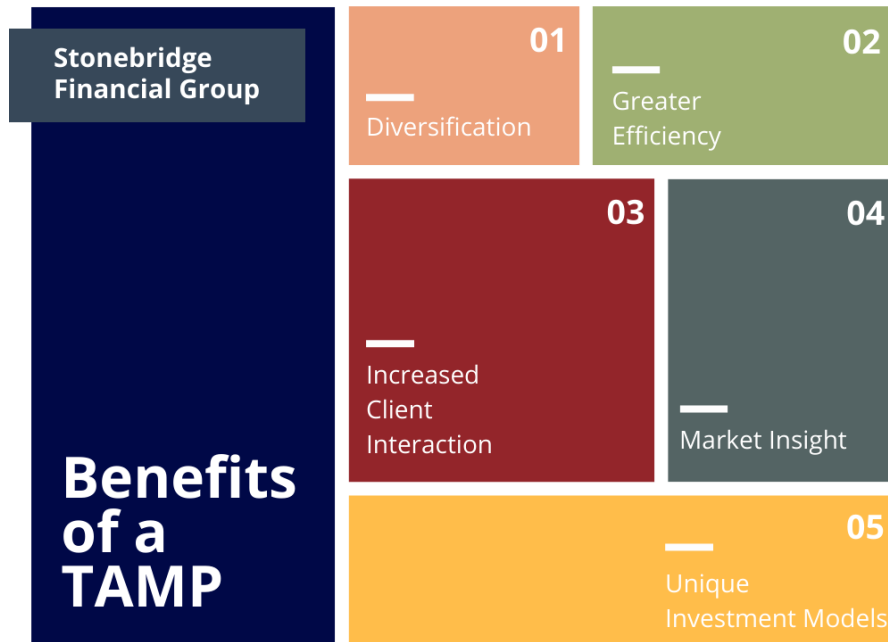
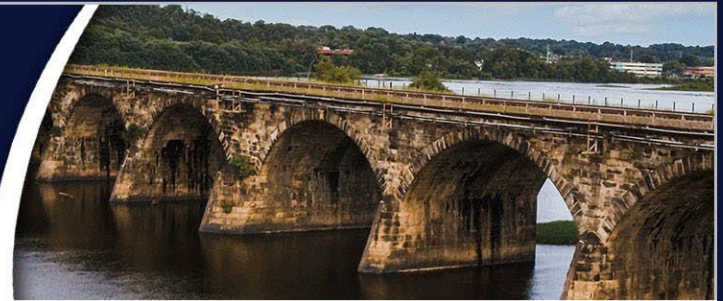
Advisors who utilize TAMPs regain the time and resources they need to invest in their current clients and spend time increasing their client base. The approach leads to greater efficiency for both the advisor and their client.

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Stonebridge as a TAMP

In addition to our other services, Stonebridge Financial Group also serves as a third-party TAMP for Financial Advisors and Planners looking to outsource their investment trading and research. We have a dedicated investment committee with years of experience and a multitude of credentials that is ready to trade for you and your clients. Over the years, we've developed our own array of investment models that we uniquely blend for each individual and household.

“I have been using the TAMP services at Stonebridge Financial Group for years, which has allowed me to focus more on client needs and new client acquisition to dramatically grow my practice. The ability to participate in Stonebridge’s investment committee meetings has provided me with custom solutions for all prospects and clients, which has been an incredible resource for winning new business.” — Bob Seiden, CEO and President of WhiteCliff Wealth Management

If you would like to inquire about Stonebridge’s TAMP services, visit our [For Advisors page](#) or [reach out](#) to chat with someone on our investment committee.

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