# We can help

The research you receive from your Broker/Dealer may be more CYA than ROA. In addition, you are in a regulatory environment that requires you to validate your investment selections.

Many Advisors turn to 3rd party money managers that often result in exorbitant fees and underwhelming returns.

Other Advisors may put too much time into researching, neglecting to focus on building their preexisting relationships.

iQUANT has helped investment professionals spend more time with their clients by providing easy-to use, institutional quality models.

# Contact Us

Whether you have specific investment inquiries or general questions, the **iQUANT** team is happy to help.

Please call us at **916-751-1014** or email info@iquant.pro with questions.

**iQUANT** serves Investment Professionals (only) from the United States and Canada.

United States: www.iQUANT.pro
Canada: www.iQUANT.ca

iQUANT.pro

# iQUANT

## Investment Models

Spend less time on research and more time gathering assets.

iQUANT models are for investment professionals only

# Our Services

*Do you spend too much time on research, and not enough time with clients?*

*Are you dissatisfied with the high cost and lackluster performance of 3rd party money managers?*

Spend less time on research and more time gathering assets.

iQUANT provides access to institutional-quality models that are tested against the rigors of time. Because of this, iQUANT members are empowered with the ability to make better decisions about investments because they base their choices on history rather than emotions.

- Invest your time where it matters most.
- Improved portfolio management
- Grow your client base with more time to focus on them.
- Get the competitive edge you need.

In addition, iQUANT offers a behavior-based risk assessment questionnaire and Portfolio Optimizer to help you create portfolios with unemotional efficiency.

Save Time, Improve Performance & Cut Costs with iQUANT.

# Simplify Your Life

The world of finance is a competitive one, and we know that you're always looking for ways to get ahead. That's why our service will never be shared with the public - it’s only available to Investment Professionals.

iQUANT's monthly email reports will keep you up-to date with the most current portfolio and model selections. This information is also prominently displayed on our Members page.

As the Advisor, you simply input the tickers and their respective weightings into your rebalancing tool and let the rebalancing tool do the rest.

Rebalanced and ready for success! You can rebalance as many accounts in less than an hour a month (or quarter) with time-tested, emotion free investment models.

*“Recent research showed that model portfolio solutions could help financial advisors better utilize their time and create a more efficient advisory business. These strategies may help improve client retention by 33%, help attract 20% more clients, drive an improved perception of an advisor among 63% of clients, and be better prepared for Reg BI.”*

*-Modern Alpha Channel*

# Our Models

Whether you want to spend more time gathering assets…or you are unhappy with your current 3rd Party SMAs, we offer robust rules-based investment models to help you with your business.

Here is a small sample IQUANT models designed to satisfy your clients’ needs and your investment style:

Debt Income:

- Global ETF Income Model
- ETF Multi-Asset Income Model

Equity Income

- Large Cap High Yield Model
- Dividend Growth 10 Model

Thematic

- 40 Days (Faith-Based) Model
- ESG 10 (Sustainable) Model

Hedge

- All Assets ETF Model
- ETF Inflation Hedge Model

Rotational

- Share Buyback Screamers Model
- Global Style Box Rotation Model