Introducing Smartleaf Overlay

Smartleaf helps wealth management institutions grow by streamlining the way they manage customized investment accounts. We offer an overlay portfolio management solution currently used to oversee more than $50 Billion in assets.

At the firm level, Smartleaf is a tool for rapidly distributing and implementing investment ideas. At the account level, it automates customized rebalancing to free portfolio managers from manual tasks. Unlike other portfolio management solutions, Smartleaf provides proactive trade recommendations for every account, along with daily metrics to help managers identify opportunities to add value.

Banks using Smartleaf have lowered the dispersion of their investment accounts by 60%, reduced client tax burden by more than 75% and implemented their investment ideas up to 10 times faster.

75% Reduction in client tax burden.

Less time trading. 3x More time for clients and prospects.

60% Reduction in average account dispersion.

For Firms

Efficient Delivery of Investment Ideas

- Firm-level changes—in tactical asset allocation or preferred model—cascade down to the appropriate accounts automatically.

Firm-Wide Consistency

- Automation makes it possible to implement a prudent, consistent, daily process of customized portfolio management.

Operational Simplicity

- Overlay separates research and stock selection from account customization, reducing costs and eliminating the duplication of infrastructure required by traditional SMA and mutual fund programs.

For Portfolio Managers

Customization Made Easy

- Spend less time trading and more time building your business. Each client's personal investment profile is captured on Smartleaf to make ongoing, customized account management efficient and easy.

Daily Metrics

- Smartleaf delivers daily metrics that help portfolio managers identify opportunities to add value by reducing drift or realizing tax benefits in a timely manner.

Risk Management

- Smartleaf analyzes every account daily, ensuring that outlier portfolios are identified and addressed in just one business day.

For Investors

A Truly Personalized Investment Experience

- Automating customization allows each investor to follow their own preferences and frees their advisor to spend more time understanding their needs.

Higher After-Tax Returns

- Automated tax management makes year-round, active tax management possible, while a holistic view of the entire portfolio keeps drift low.

Daily Portfolio Review

- Powerful workflow features allow PMs to review every account every day in just a fraction of the time, enhancing risk management and the ability to respond to changing market conditions.

To learn more, email sales@smartleaf.com or call 617.453.0078 today.

Smartleaf, Inc. | 210 Broadway, Cambridge, MA 02139