



THE RIGHT VIEW TO MANAGE INVESTMENTS.



ARETE
WEALTH

A digital, on-demand investment solution for high-net-worth clients.

ARETE VIRTU is the advisor's ally and the answer to all the reporting your investors request.

OPEN ARCHITECTURE PLATFORM

with a full array of
wealth management &
investment advisory
options.

GO GREEN

and 100% digital
with a custom
client portal
experience

FULLY INTEGRATED VIEWS

across multiple
types of traditional
+ alternative
investments

TRACK & MEASURE GROWTH

across conservative,
moderate and aggressive
investment
strategies.

100% CUSTOMIZABLE

at both the
advisor and
investor levels



A Single, Connected Platform

With access to an open universe of investment strategies—including select hedge funds, private equity, real estate, and private debt—we’ve built a platform to deliver a comprehensive view of wealth for advisors and their clients.

We have advanced tools that help advisors design and manage client portfolios with optimized views, powered by access to the most current data and cutting-edge resources available in an ever-changing technology landscape.

CUSTOM
REPORT
BRANDING

VISUAL
CHARTS &
GRAPHICS

EMAIL &
VIDEO
STATEMENTS



Arete Virtu Suite of Solutions



VIRTU **GUIDED PORTFOLIO**

is a stand-alone solution executed in your clients' existing fee-based brokerage account. This single manager solution offers broad diversification and dynamic management in a single portfolio. Managers include Anchor Capital, Goldman Sachs Asset Management, Putnam Investments, State Street Global Advisors, and Zacks Investment Management.



VIRTU **TACTICAL PORTFOLIO**

is a multi-manager solution with a management style designed to invest in the right markets at the right time and adjust to a more defensive posture during periods of market volatility. This strategy is professionally managed by third-party money managers and overseen by our partner, Axxcess Wealth Management.



VIRTU **OCIO PORTFOLIO**

is professionally outsourced to third-party CIOs who customize, manage, and monitor your clients' allocation, support client communications, and engage in the review process. Accounts are allocated to third-party money managers and administered by our partner's platform, Axxcess Wealth Management. You choose your OCIO and work with them as the partner in your business.



VIRTU **OPEN PORTFOLIO**

is an open architecture, which allows you to run your own models, alongside the managed portfolios of some of the best money managers in the world. More than 150 strategies blend and build your ideal solution for your client in a single brokerage account.

See more good in investing.

Schedule a demo and get more details today.



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