



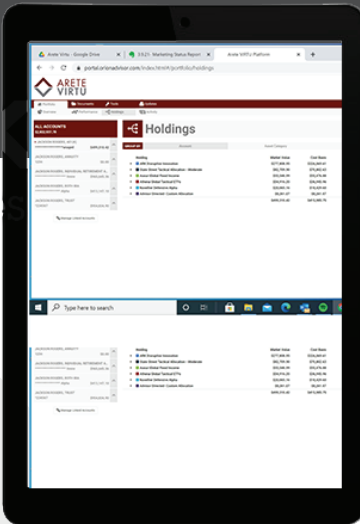
Outsourced Chief Investment Officer (OCIO) Portfolio

THE RIGHT WAY TO MANAGE INVESTMENTS.

ARETE VIRTU offers comprehensive billing, aggregated reporting, and financial planning for advisors looking to scale their advisory practice. Virtu provides a mobile app as well as an on-demand portal for clients to directly link their outside accounts, providing advisors a complete picture of their clients' total wealth. With complete oversight, Virtu allows advisors to provide a number of customized strategies and services based on their investment goals.

VIRTU OCIO PORTFOLIO

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



RISK PROFILE

Complete a client risk profile on virtu.aretewealth.com and validate your client objectives.



MANAGER CHOICE

Example OCIOs: Skyview Investment Management, Taiber Kosmala, and Axxcess Wealth Management.



EXECUTION

Allocations are digitally signed. Manager and Program ADVs are automatically sent to clients.

MORE POWERFUL WITH OUR PARTNERS.

Arete Virtu is built on Orion Advisor Tech and administered by the Axxcess Platform from Axxcess Wealth Management.



ARETE
WEALTH