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## SMartX Advisory Solutions Expands OCIO Offering

### TPW Investment Management (TPWIM) to Provide Portfolio Construction and Market Outlook Services

SMartX Advisory Solutions (“SMartX”), a leading financial technology and Turnkey Asset Management Platform (TAMP), and TPW Investment Management (TPWIM), a global, multi asset, ETF based investment solutions firm, today announced a partnership to expand the OCIO services and market analysis offered to SMartX’s RIA and broker/dealer clientele.

Based in New York City, TPW Investment Management will work directly with SMartX’s in house Chief Strategist to assist with the creation and monitoring of investment portfolios, as well as the on-going education of SMartX platform clients across global economics, politics, policy & markets. In addition to providing periodic financial market & economic outlooks, TPW Investment Management will work closely with individual advisors to help shape the portfolio construction process around unique investment objectives of each client. Users of the SMartX platform are able to engage the firm’s OCIO services to obtain institutional strategy analysis and portfolio construction recommendations, coupled with TPWIM’s principals combined over 25 years of ETF expertise. Firms can work with SMartX at multiple levels, ranging from initial portfolio construction services through to on-site meetings, client conference calls, and presentations. Many services are built into the existing platform fee structure, keeping in line with the overarching idea of minimizing client expenses to reduce the operational cost of managing an advisory business.

TPWIM’s global macro ETF portfolio suite will also be available on the SmartX platform. It features three risk based portfolios ranging from income to equity anchored by the flagship Global Macro Multi Asset portfolio.

“Jay Pelosky’s prominence in the investment management industry and insightful market outlooks provide an unparalleled resource for SMartX clients,” said Evan Rapoport, CEO of SMartX Advisory Solutions. “SMartX offers over 500 strategies across trading styles and the investment spectrum. The countless combinations and varying client investment objectives create a natural demand to work with firms such as TPWIM who are familiar with the strategies, ETFs, and asset allocation best practices,” indicated Mr. Rapoport.

“TPWIM is proud to partner with a market leader in SMartX to provide its clients with our independent & original asset allocation and portfolio strategy thinking. ETFs offer a cost effective, transparent way to access the global public markets. The SMartX platform shares our similar values in offering low cost access to institutional type products and services. We look forward to working with SMartX and its clients to help achieve their investment objectives,” said Jay Pelosky, Co-Founder of TPW Investment Management.

#### About SMartX Advisory Solutions

SMartX Advisory Solutions ([www.smartxadvisory.com](http://www.smartxadvisory.com)) is the next generation turnkey asset management platform and the only platform to seamlessly offer traditional, alternative, and passive direct index strategies in a unified managed account structure. The firm also uses its proprietary trading and managed accounts technology to power SMartX ([www.smartx.us](http://www.smartx.us)), SS&C Advent’s integrated unified managed account solution.

#### About TPW Investment Management

TPW Investment Management (TPWIM) ([www.tpwim.com](http://www.tpwim.com)) is an investment solutions firm co-founded by former Morgan Stanley Global Strategist Jay Pelosky and former JAFornlines Global COO James Gardiner. The Firm provides clients with ETF based, global, multi asset investment solutions built off a replicable & robust risk based investment process. TPWIM’s unique Tri Polar World framework generates a differentiated view of the global investment landscape & helps identify original, long term secular investment ideas. TPWIM’s proprietary Global Risk Nexus (GRN) Scoring System serves to develop and test Global Macro thematic and tactical strategies.