In today’s competitive marketplace, efficiency is essential for your success. Yet the demands of investment management—the time and attention you spend monitoring investment strategies, watching out for unintended portfolio risks, and staying up to date on the latest business and portfolio insights—can be barriers to developing other areas of your practice.

Asset Allocation Model Review is designed to help you add value to client portfolios and build a more scalable, efficient practice through access to the guidance and expertise of T. Rowe Price’s $300+ billion multi-asset franchise.

**PROGRAM FEATURES**

- **Actionable recommendations**
  Access balanced, professional guidance on asset allocation adjustments intended to enhance consistency and improve investment outcomes.

- **Risk management**
  Pinpoint unintended investment risks, including concentrated exposure to regions, styles, sectors, credit, and other areas of potential concern.

- **Scenario testing**
  Stress-test your portfolios against different market scenarios and select from a variety of benchmarks to enhance your evaluation process.

- **Outcome-oriented assessments**
  View analyses of historical data to assess likely portfolio outcomes and the potential for excess returns.

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**82%**

of financial professionals are interested in receiving portfolio construction guidance from an asset manager.*

**77%**

DIVERSIFICATION

**45%**

INDIVIDUAL FUND PERFORMANCE AND TRACK RECORDS

**42%**

AVOIDING CONCENTRATION IN PARTICULAR SECURITIES

The most important advantages afforded by portfolio construction according to financial professionals.*

Program Support

Comprehensive Reporting
Enhance your portfolio design through a customized report containing a detailed summary, in-depth analysis, and balanced implementation proposals.

Personalized Consultations
Your T. Rowe Price Investment Consultant can schedule a complimentary portfolio review with one of our dedicated Portfolio Construction Specialists.

Multi-Asset Expertise

Our full suite of Portfolio Construction Solutions is informed by the expertise of T. Rowe Price’s Multi-Asset Division.

Strategic Portfolio Design
An in-depth portfolio construction process aligns the investment objectives of our multi-asset strategies to a diversified mix of assets intended to maximize long-term investment outcomes.

Tactical Asset Allocation
Based on relative valuations and a near-term global outlook, our experienced Asset Allocation Committee makes periodic tactical adjustments to the strategic asset allocation.

Fundamental Security Selection
Specialized investment professionals manage the component portfolios underlying our multi-asset strategies, with a focus on independent proprietary research and active security selection.

Take the next step.
Contact your Investment Consultant.
Whether you’re ready to schedule a one-on-one model review or you simply have questions about the program, your dedicated T. Rowe Price Investment Consultant is here to help.

PHONE 1-800-564-6958  EMAIL AdvisorServices@troweprice.com

Explore the full suite of Portfolio Construction Solutions.
Asset Allocation Model Review is one of several programs offering financial advisors access to T. Rowe Price’s asset allocation and portfolio construction resources.

To learn more about the full suite of Portfolio Construction Solutions, visit troweprice.com/portfolioconstruction.

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Portfolio Construction Solutions discussed are available only to financial professionals and not the retail public.

All figures as of December 31, 2019, except where noted.

*Firmwide multi-asset portfolio assets under management include assets managed by T. Rowe Price Associates, Inc., and its investment advisory affiliates. This figure includes assets that are held outside of T. Rowe Price but where T. Rowe Price influences trade decisions.

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