

Gotshal Rhoades Will Launch Target Link to Help Improve Investors' Outcomes

The firm's new tool will enable its advisors to apply a goals-based investing approach for investors

SINGAPORE, July 22, 2021 /EINPresswire.com/ -- [Gotshal Rhoades](#), an investment management firm that offers a broad spectrum of investment strategies, today announced the upcoming launch of Target Link, a planning and offering solution that gives the opportunity to advisors to combine goals-based planning and investment strategies within a single, dynamic system. Target Link, will be available as an add-on for Gotshal Rhoades and soon as a stand-alone firm's base tool. Powered by Gotshal Rhoades' research and grounded in behavioral science, after a first fruitful collaboration with the recently acquired financial planning software provider, ConsultProLogic, this new innovative tool has opened new horizons into the financial planning services industry.

Target Link makes it easy for advisors and customers to put targets and goals at the center of their portfolio and helps advisors to prove the value they bring as not only money managers, but also financial coaches who help customers retire, save for children's college, take family vacations and enjoy their lives. Also, more advisors can now expand their investment planning strategies to more investors, because the new simple, scalable planning system does not require the hours traditional financial planning methods do.

"Advisors are continuously being pushed to compete and innovate to meet customers' demands," said Daniel Chong, Managing Director at Gotshal Rhoades. "Target Link promotes a true collaboration between advisor and customer to detect the most significant goals and combine them with the personalized investment strategies. As a result, investors can collaborate with their advisors to set the right expectations and buy into their plans. When investment choices are clearly deep-rooted in investors' inherent motivations, investors are more likely to stay on track and be focused to achieve their goals," added Chong.

Target Link helps address the fact that identifying investor's true goals can be surprisingly challenging. In fact, recent behavioral science research from Gotshal Rhoades showed that 76% of investors changed at least one of their previously identified top three goals after reviewing and prioritizing financial goals from an initial list. With this in mind, this solution uses the initial list approach and is designed to equip customers with the information and confidence needed in creating investment plans that make their goals achievable.

"The traditional advisor model is evolving. In order to serve the needs of today's customers and prospects, advisors need to be able to have a conversation with clients about their goals, and how the advisor can help them achieve their goals. Today advisors need a tool that is swift, easy, and actionable. Platforms like Target Link offers the possibility for advisors to efficiently and at a low-cost provide strategic advice grounded in the main principles of human behavior to customers and prospects," added Daniel Chong.

[About Gotshal Rhoades](#)

Gotshal Rhoades is an investment management firm that merges proven theories about security analysis and portfolio management with a genuine interest in helping people and institutions achieve their financial goals. The company serves individuals, corporations, pension funds, foundations, and endowments via a selection of specialist asset classes, including low volatility strategies, capitalizing on in-house fundamental and quantitative capabilities. The professionals at Gotshal Rhoades are proud to partner with customers to deliver sophisticated solutions that result in their success. Gotshal Rhoades continuously expands its investment and wealth management offerings to keep pace with the evolving landscape.

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