

Adhesion Celebrates 25 Years of Empowering RIAs Through Innovation

CHARLOTTE, NC, UNITED STATES, May 28, 2024 /EINPresswire.com/ -- Adhesion, a leading provider of innovative wealth management solutions for RIAs, celebrates its 25th anniversary this year. Founded in 1999, the company has undergone a significant transformation since its early days, evolving into a vital partner for RIAs. Today, Adhesion is well known for offering advisors the tools and technology needed to thrive in the ever-changing financial landscape.



"Adhesion's 25-year journey is a testament to our dedication to innovation along with a commitment to the fiduciary model. We are passionate about delivering innovative solutions that empower RIAs to grow their businesses," said Barrett Ayers, CEO of Adhesion. "We began by focusing on account aggregation, a pioneering concept in the world of online finance. This focus on innovation continued when I joined in 2004. We pivoted to serve the fee-based community of RIAs, a segment underserved in a world otherwise dominated by commission and transactional business. This shift aligned perfectly with our passion for prioritizing client-centricity and fiduciary responsibility. I believe this adaptability and unwavering commitment has been core to our success."

Today, Adhesion's platform empowers thousands of RIAs with a comprehensive suite of tools that allow advisors to grow through outsourcing, anchored around the industry's second-largest model marketplace, a powerful UMA platform, performance reporting, analytics, client engagement technologies and an investment consulting organization that can operate as an extension of the advisor's own team.

"This technology-driven approach is at the heart of Adhesion's value proposition," Ayers continued. "It streamlines advisors' operations, enhances efficiency, and allows RIAs to focus on what matters most – building strong and enduring client relationships while delivering exceptional service."

Adhesion remains committed to supporting RIAs with innovative solutions that enhance their

practices. By embracing technology and collaboration, Adhesion empowers advisors to deliver exceptional value to their clients. As the company celebrates its 25th anniversary, the focus on the future is evident in several key initiatives that will build an even stronger foundation for RIAs:

- Industry-Leading Platform: Investing in platform development to offer deeper data insights, more automation, additional tax opportunity insights, ubiquitous platform access, improved service levels, and interactive next-gen decision support tools.
- Next-Generation Investment Solutions: Upcoming launch of additional investment services, new research capabilities, Modular Pre-built Core/Satellite Portfolios built around third-party active managers with industry-leading research and diligence, combined with direct index capabilities. Additionally, the company is evolving its ETF Select program with fewer constraints and more options, as well as introducing new dynamic-harvesting capabilities for direct index sleeves to maximize harvesting capabilities in active/passive blended portfolios.
- Enhanced Client Support: Adhesion's commitment to RIA success extends beyond technology. The firm recently announced new additions to the executive leadership team to ferociously support advisors. In addition, Adhesion has expanded the client service team and extended service hours to provide advisors with unparalleled support.

"The wealth management industry is constantly evolving, and RIAs need a service-minded technology partner who can not only keep pace but also see where the puck is going," said Ayers. "We are not just committed to staying ahead of the curve. We are actively shaping the future. By investing in innovation and forging strategic partnerships, we will ensure that Adhesion remains the trusted advisor technology platform for RIAs for the next 25 years and beyond."

About Adhesion Wealth

Adhesion Wealth® is a leading provider of outsourced investment management solutions for registered investment advisors (RIAs). Adhesion Wealth empowers advisors with the ability to build their own multi-manager (UMA) strategies, access SMA strategies and use other turnkey investment solutions on the Adhesion Manager Exchange. Adhesion Wealth also provides advisors with personal and direct indexing, tax management, tax transitions, portfolio administration, practice analytics and client reporting. With Adhesion, advisors gain access to a scalable, multi-custodian platform upon which to grow successful practices.

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