

Julex Capital Launches Outsourced CIO Solutions for Financial Advisors

WELLESLEY, MA, UNITED STATES, July 24, 2024 /EINPresswire.com/ -- [Julex Capital Management](#) today announced [Julex-OCIO](#), their new Outsourced Chief Investment Officer business division. Julex-OCIO offers a comprehensive menu of investment solutions and services to help financial advisors streamline and grow their practices.

Instead of hiring expensive in-house investment professionals, advisors can now use Julex-OCIO as their investment team to gain a competitive advantage over competitors through the use of institutional-quality asset management, improve their profitability, and grow more rapidly.

“The financial advisor’s role has evolved from investment manager to financial planner, tax minimizer, guidance counselor, and life-coach . . . charting the best path for their client’s life-long journey. Back in 2012, 54% of advisors considered investments to be their primary value proposition. By 2020, this proportion fell to 33%. Today the number is under 25%. In reality, financial advisors don’t need another investment product . . . there are millions of them out there. What they need and want is thoughtful, well-targeted, economically priced support, i.e., a service,” says Dr. [Rob Brown](#), Julex-OCIO Team Leader. “Advisors are seeking solutions and instantaneous support to make their lives easier and their practices more efficient. Julex-OCIO aims to eliminate advisor stress concerning investments and investment support, so they can focus on more important client needs.”

Julex-OCIO support covers six key advisory-practice requirements:

- Custom-tailored investment portfolios,
- Client account trading and tax-loss harvesting,
- Compliance-approved collateral for use with clients and prospects, accompanied by



Dr. Rob Brown, Julex-OCIO Leader



Advisors don't need or want more investment products, instead they desire practical client-centric support that makes the advisor's life easier and the client's journey more predictable."

Dr. Rob Brown

straightforward advisor talking points,

- New business proposals,
- Consultations with advisors as they prepare for their upcoming client or prospect conversations, and participation in client or prospect meetings, as needed, and,
- Access to institutional-quality private and alternative investments.

The Julex-OCIO Leadership Team and Advisory Council boast some of our industry's most experienced leaders.

Before joining Julex, Dr. Brown spent over 30 years in various leadership roles, including Chief Investment Officer positions with Integrated Financial Partners, Goldman Sachs Personal Financial Management, Genworth, and Arizona Public Safety Personnel Retirement System. Rob is also a recognized thought leader with numerous publications appearing in industry magazines and professional journals.

The Advisory Council consists of C-level executives who bring deep expertise spanning stocks, bonds, real estates, derivatives, and alternatives arenas. Julex-OCIO's solution is supported by PhD-level research analysts and portfolio managers. Our investment professionals are available seven days a week, poised to support advisors as they prepare for critical client or prospect conversations.

Julex-OCIO maintains a flexible pricing plan, ranging from 10 to 60 basis points on covered \$AUM. The price that we finally agree upon results from an in-depth conversation to determine the level of engagement. It is all about meeting advisors' needs for their practice and each practice is different.

For more information on Julex-OCIO, please visit ocio.julexcapital.com or contact Dr. Rob Brown at rob.brown@julexcapital.com. Additional background can be obtained on LinkedIn at www.linkedin.com/in/rob-brown-a398022b1

About Julex Capital Management - Julex Capital Management, LLC (Julex) is an investment management firm dedicated to creating innovative solutions in the areas of asset allocation, quantitative investing, and option overlays. Julex's mission is to help investors reach their financial goals by delivering consistent performance through a systematic and repeatable investment process. Julex operates as an investment manager as well as an investment consultant. For advisors or institutions without an internal investment team, Julex can serve as an outsourced CIO solution, performing all of the needed investment-related functions.

Dr. Rob Brown
Julex Capital Management, LLC

+1 818-983-6126

rob.brown@julexcapital.com

Visit us on social media:

[LinkedIn](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/730105186>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2024 Newsmatics Inc. All Right Reserved.