Quartz Partners Expands Advisor Access to Its Quantitative SMA Strategies Across Managed Account Platforms

Quartz Partner's full suite of quantitative strategies are now available to financial advisors on Envestnet, Adhesion Wealth, Charles Schwab & Orion Communities



Quartz Partners Investment Management

SARATOGA SPRINGS, NY, UNITED STATES, September 17, 2026 /EINPresswire.com/ -- Quartz Partners Investment Management ("Quartz"), an SEC-registered investment adviser specializing in proprietary quantitative separately managed account strategies, today announced that its core suite of SMA model strategies is now available to financial advisors through three of the wealth management industry's largest managed account platforms: Envestnet, Adhesion Wealth and Orion Communities

> Distribution has never been the hard part of asset management, being available in the workflow an advisor already uses has been. An advisor shouldn't have to adopt a new platform. Now they don't."
>
> *Kyle P. Webber, COO*

The additions place Quartz's Astra, Athena and Dynamic series in front of a substantial share of the U.S. advisor population without requiring advisors to leave the platforms they already rely on to run their practices. Envestnet reports that its technology and services are trusted by more than one-third of all financial advisors. Adhesion Wealth, operated by AssetMark, provides registered investment advisors with a multi-custodian managed account platform and manager exchange. Orion Communities is the open-architecture turnkey asset management program (TAMP) within Orion's wealth technology platform.

"For a boutique manager, the hard part of distribution is being where the advisor already works," said Kyle Webber, Chief Operating Officer of Quartz Partners. "An advisor shouldn't have to adopt a new platform, open a new operational relationship or re-paper an account to access a differentiated strategy. Now they don't have to. Our models sit alongside the largest managers in the industry, in the same proposal tool, on the same statement, in the same rebalance."

Research-driven by design. Founded in 2015, Quartz has built its strategy suite around three

distinct signal sets rather than a single overlapping factor. The Astra series applies a bottom-up multi-factor model that grades roughly 3,000 companies on economic profit margin — the return a business generates relative to its actual cost of capital — to build focused 20-to-25 stock portfolios of durable, high-quality compounders. The Athena series is built on a survivorship-bias-free behavioral finance dataset covering more than 250,000 securities and backed by six patents, seeking to translate the aggregate real-world decisions of market participants into expected returns. The Dynamic series applies the firm's P.R.I.C.E. framework — policy, risk, inflation and interest, credit, and earnings and economy — across more than 100 fundamental and technical data points to allocate an unconstrained ETF portfolio and seek to reduce risk exposure during protracted drawdowns.

The firm's quantitative research is directed by Dr. C. Thomas Howard, Professor Emeritus at the Reiman School of Finance, Daniels College of Business at the University of Denver, where he taught and published in behavioral investment management and international finance for more than 30 years. He is the author of Behavioral Portfolio Management and The New Value Investing and co-author of Return of the Active Manager.

"Every one of these strategies was designed to do something a passive allocation cannot," said Lambert Bunker, Vice President of Distribution at Quartz. "Advisors are not looking for another large-cap blend sleeve. They are looking for return streams that behave differently from the ones they already own, and for a manager small enough to still be nimble and research-driven. That is the whole thesis of the firm."

Built to be blended. Because each series draws on a distinct signal set — fundamental quality, investor behavior and macro regime — the strategies are designed to be combined within a single client account across the risk spectrum, from Moderately Conservative through Aggressive, rather than deployed in isolation. Quartz works directly with advisors to construct blended models mapped to a client's risk profile.
Quartz strategies are also available on over a dozen additional platforms and custodial programs, including Charles Schwab, Goldman Sachs, Apex, RBC, SmartX, and Amplify.

Advisors interested in accessing Quartz strategies can reach the firm at LearnMore@QuartzPartners.com or 800.433.0422. Strategy availability by platform, minimums and model details are available at www.quartzpartners.com

About Quartz Partners Investment Management. Quartz Partners Investment Management is an SEC-registered investment adviser based in Saratoga Springs, New York, specializing in proprietary quantitative investment strategies delivered to financial advisors through separately managed accounts. The firm's Astra, Athena and Dynamic series are built to capture distinct, academically grounded sources of return that seek to enhance alpha while reducing overall portfolio beta.

Kyle Webber

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