

How Can Model Portfolios Add Value to Your Practice?

Speakers: Alexandra Wilson-Elizondo (Global Co-Head and Co-CIO of Multi-Asset Solutions)

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Transcript

00:00:00 – 00:00:28 **Alexandra Wilson-Elizondo**

At Goldman Sachs Asset Management, our goal is simple: to help advisors pursue better outcomes for their clients. Our model portfolios are designed to streamline your practice, freeing up your time to focus on building and maintaining client relationships. You can concentrate on providing the specialized advice your clients expect and rely on, while we aim to support you with access to institutional-quality investment solutions.

00:00:30 – 00:01:11 **Alexandra Wilson-Elizondo**

We start with a global investment framework that combines top-down macro views with rigorous manager selection across asset classes. Each model reflects our highest conviction views on markets and portfolio construction. Whether growth-oriented, income-focused, or designed for tax awareness, we endeavor to build portfolios strategically with a focus on meeting client objectives.

[Disclosure]: There is no guarantee that objectives will be met

Every portfolio is continuously monitored and refined by a dedicated team of portfolio managers. Additionally, our independent risk specialists provide multiple lines of defense, seeking to deliver discipline and consistency throughout the entire process.

00:01:14 – 00:02:26 **Alexandra Wilson-Elizondo**

We understand that every advisor's business is unique. That's why we offer a flexible suite of models blending strategic and dynamic asset allocation, built to integrate seamlessly into your process. This approach is designed to help you focus on what matters most: your clients.

We recognize the pivotal role advisors play in guiding clients through volatility. To support you, we deliver a comprehensive, advisor-first toolkit. This includes dedicated model specialists, timely trade alerts, and concise, client-ready market commentaries. Beyond investment outcomes, working with GSAM can potentially help you lead more impactful conversations, keep clients aligned with their plans, and strengthen long-term retention.

As the market evolves, we continue to innovate. Our goal is to make sophisticated strategies more accessible to you and your clients.

[Disclosure]: There is no guarantee that objectives will be met

At Goldman Sachs Asset Management, we bring institutional expertise to advisors through model portfolios, empowering you to thrive in today's dynamic world and equipping you to serve your clients.

Please reach out to your Goldman Sachs Asset Management representative to learn more about our model portfolio offering.

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