





Strategist Videos

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To view individual strategist videos, click the titles below.

	<p>Altegris Client Video</p> <p>Altegris: Matt Osbourne, Executive Vice President, and Jack Rivkin, CIO, review the philosophy behind the firm’s one click solution alternatives strategies on the AssetMark platform.</p>
	<p>Aris Client Video</p> <p>Aris: Representatives discuss the level of service their team offers to their clients as they use qualitative and quantitative methods to deliver personalized client solutions.</p>
	<p>Beaumont Client Video</p> <p>Beaumont: David Haviland, Managing Partner, and Charles Garabedian, Investment Advisor, highlight the flexibility and accessibility of the firm’s tactical investment solutions.</p>
	<p>BlackRock MAI Client Video</p> <p>BlackRock Multi-Asset Income: Michael Fredricks, Managing Director, discusses the firm’s core beliefs and how they relate to the AssetMark Multi-Asset Income strategy.</p> <p>BlackRock RFI Client Video</p> <p>BlackRock Risk Focused Income: Bryan Jacobi, Financial Advisor, and Michael Gates, CFP, give an overview of the Risk Focused Income strategy and how it solves client challenges.</p>
	<p>City National Rochdale Client Video</p> <p>City National Rochdale: Garrett D’Alessandro, CEO, and Bruce Simon, CIO, discuss the use of intelligent personalization when customizing client investment solutions.</p>

	<p style="text-align: center;">Eaton Vance Client Video</p> <p>Eaton Vance: Representatives identify the firm’s core values and the process used to manage their tactical constrained portfolios on the AssetMark platform.</p>
	<p style="text-align: center;">Forward Client Video</p> <p>Forward: Alan Reid, CEO, explains the firm’s alternative investments and the strategy behind using nontraditional sources of yield to reach client goals.</p>
	<p style="text-align: center;">J.P. Morgan Client Video</p> <p>J.P. Morgan: Mike Nelson, Vice President, explains how the firm’s strategies focus on outcome orient solutions in order to meet the goals and objectives of clients.</p>
	<p style="text-align: center;">Litman Gregory Client Video</p> <p>Litman Gregory: Representatives explain what intellectual honesty means to the firm and how it influences their fundamental and disciplined investment process.</p>
	<p style="text-align: center;">New Frontier Client Video</p> <p>New Frontier: Dr. Richard Michaud, President, and Robert Michaud, CIO, highlight the importance of technology in the firm’s investment process in order to create diverse portfolios.</p>
	<p style="text-align: center;">State Street Global Advisors Client Video</p> <p>SSGA: Dan Farley, CIO, discusses the firm’s investment solutions group and how their delivery and drive for investment excellence propels their investment solutions.</p>

William Blair

[William Blair Custom HNW Client Video](#)

William Blair Custom HNW: Representatives describe the firm's culture and how they develop their customized HNW strategy to meet individual client needs.

[William Blair Global Macro Client Video](#)

William Blair Global Macro: Representatives explain the importance of philosophy, process, and people when it comes to managing an investment strategy.



[Windham Client Video](#)

Windham: Mark Ktrizman, CEO, and Lucas Turton, CIO, explain the benefits of employing a team with diverse backgrounds and the firm's focus on risk management and asset allocation.