Helios Quantitative Research

Research Analyst & CIO

DETAILS

Phone
(916)781-2332

Email
hello@heliosdriven.com

LINKS

Website

LinkedIn

Due Dilly Podcast

SKILLS

Quantitative Portfolio Construction
● ● ● ● ●

Investment Fund Due Diligence
● ● ● ● ●

Financial Services Operational Support
● ● ● ● ●

Financial Services Client Facing Support
● ● ● ● ●

Internal Training and Team Communication
● ● ● ● ●

HOBBIES

Making you look good!

Required Compensation

Less than a CFA, zero benefits, zero payroll taxes.

Overview

Dedicated quantitative research team with a proven track-record to help principal Financial Advisors achieve these three objectives:

- Grow and retain client assets by providing a world-class asset management experience.
- Increase scale firmwide by creating leveraged assets such as tools, models, insights, research, dedicated support, and client-facing materials.
- Increase operational efficiency by introducing internal workflows and advisor resource centers that allow you to spend more time doing what you do best.

A few reasons why you should hire us

- We will help you build custom quantitative model portfolios for your firm. These models will work for every client and account type, and we will provide the research to easily maintain them.
- We will ensure that your set of models are different than your direct competitors. Therefore, they can become a point of emphasis in your value prop with clients and prospective clients.
- We will build the sales/marketing collateral for these models that you can white-label. In addition, we will create a learning management system for your staff to train on how to effectively communicate them to their clients and prospective clients.
- We will provide, at minimum, monthly research updates on these models with full white-labeled research reports, investment committee documentation, and copy/paste narrative to share with your clients.
- We will provide you with a thorough analysis of all mutual funds and ETFs that your firm allocates to and/or is performing due diligence on. Our fund analysis will be proprietary and provide an additional value prop differentiator for your firm. We can update this research frequently as you need them.

OUR PROMISE TO YOU

We will never leave you for another job.

We are not married to any platform.

We do not cost you benefits, payroll taxes, etc.

THE CATCH

There is none, this is a flat fee arrangement.

There is no per account fee.

There is no basis point fee.

There is no conflict with any investment selections.

CURRENT CLIENTS

800+ Financial Advisors who collectively manage $30+ billion in assets.*

REFERENCES

Available upon request.

- We will provide you with everything that your firm needs to run and document an ongoing investment committee process. We will also provide supplemental research on an as needed basis to serve as additional points of collateral for your archives.
- We will provide a weekly overview of the markets and give you talking points for you to copy/paste for your clients.
- We will host a weekly call with you and other advisors to discuss market happenings and important updates.
- We will provide you with a mid-month market summary that updates your clients on the overall markets and economy, as well as the potential impacts they may or may not have on the model portfolios. You can copy/paste this info for client/public distribution.
- We will make sure you are well-versed in our investment offerings and consistently seek to offer the most cutting-edge solutions for your clients.
- We will be available for ad-hoc investment-related questions from you and your clients.

You will always own the models created and maintain full discretionary control of execution and any other IP that has been delivered to you.

Abbreviated Employment History

Chief Investment Officer at *Sawtooth Solutions*

Chief Investment Officer at *WGG Wealth Partners*

Portfolio Manager at *Columbia Threadneedle*

Senior Quant Analyst at *Columbia Threadneedle*

Research Associate & Trading Associate at *Bridgewater Associates*

Vice President at *Mount Yale Capital Group*

Senior Manager, Business Strategy at *Charles Schwab*

Abbreviated Education History

MS, Finance, Quantitative Finance at *London Business School*

MBA, Finance at *Berkeley, Haas School of Business*

Ph.D., Philosophy at *Princeton University*

BS, Business, Finance at *University of Minnesota*

BSB, Finance at *University of Minnesota*

BA, Business Management, Law at *University of St. Thomas*

BS, Mathematics/Economics, at *UCLA*

BA, Finance at *Cornell University*