



Helios Quantitative Research

Inourced CIO

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Email

hello@heliosdriven.com

REFERENCES

"From an efficiency standpoint, my practice is so lean and mean. It's everything I'd ever envisioned without hiring five people."

Brian B. CFP® A Current Helios Client

"Helios has made it simple to tailor fit investment models to client-specific needs."

Lucas N. CFP® A Current Helios Client

"By utilizing Helios, we have been able to double our firm's revenue, enhance returns for our clients and save tons of time in the back office, allowing us to focus on our energy on engaging with clients"

Kevin T. CRPC™ A Current Helios Client

HOBBIES

Making you look good in front of your clients!

LINKS

[Website](#)

[LinkedIn](#)

[Due Dilly Podcast](#)

Executive Summary

Helios Quantitative Research serves as an *In*sourced Chief Investment Officer (ICIO) to forward-thinking Advisors like yourself. By outsourcing your firm's research to Helios, you're able to focus on growing your practice, drive scale and efficiency, create higher margins, have deeper confidence in your investment decisions, and reduce your compliance risk.

Work Experience

Helios can be a transformational partner. We handle all six key capabilities of an elite-level asset management process:

- Analyze and select mutual funds, ETFs, and individual stocks for use within your models and across your practice.
- Customize and manage your investment models, all of which are white-labeled to your practice's brand.
- Provide the technology to analyze your client's investment portfolios and strategies.
- Create the bulk of your practice's communications, both internally to your team and externally to your clients.
- Provide research documentation for your holdings, models, and portfolios to reduce your compliance risk.
- Deliver initial training and ongoing support to your practice.

Abbreviated Education

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 the *University of Minnesota*

BSB, Finance at the *University of Minnesota*

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

BS, Mathematics/Economics, at *UCLA*

BA, Finance at *Cornell University*

Required Compensation

Helios is like having an entire investment department at your fingertips for a fraction of the cost of hiring a portfolio manager – with no benefits, taxes, or HR!