

Loring Ward Added to Folio Financial's Third Party Model Manager Exchange

MCLEAN, VA, November 14, 2019 Folio Financial, Inc., a leading digital-first brokerage, custody and FinTech firm, today announced that Loring Ward, the Silicon Valley-based wealth management services provider, will add its DFA Series Global Portfolio models to Folio's [Model Manager Exchange \(MMX\)](#).

Folio's MMX marketplace allows advisors to license equity, mutual fund, and ETF models from third-party managers, with no minimum investor account requirements, including on Loring Ward's DFA Series Global Portfolio models. Through MMX's simple subscription process, advisors get access to Loring Ward's wealth management team, wholesaler field support, behavioral finance support, business consultation services, financial planning services, and inclusion in their investor referral program. Advisors also enjoy account management through Folio, including fully integrated, comprehensive, and seamless real-time account opening, account billing, online client reporting, tax management, order management, trading, and a whole range of practice management and custody services, all with no ticket charges or commissions.

"The addition of Loring Ward to MMX continues the march towards greater efficiency for advisors to allow them to add value to clients," says Steven Wallman, CEO of Folio Financial. "First, it allows advisors to further scale their practices by letting Loring Ward be the outsourced provider for asset allocation, rebalancing, and market commentary. Second, the Folio platform provides – seamlessly, and without an advisor needing to integrate, reconcile, negotiate with and manage multiple providers – the functions an advisor needs to manage their practice from billing and performance reporting to trade order and tax management. This way, advisors can focus on relationship-building and growth, all while lowering their costs."

"We are impressed by the community of advisors that Folio Financial has attracted, and thrilled to provide these great advisors access to our evidence-based portfolios and insightful client communication resources," says Mike Clinton, President of Advisor Services for Loring Ward. "Our academically-based, real world-tested philosophy empowers advisors to stop defending the limitations of the traditional investment approach and liberates an advisor's time so they can focus their energy on helping clients reach their goals. We see an excellent fit between our portfolios and the Folio Financial community."

The seven portfolios in the Global Portfolio Series DFA Series, built with funds advised by Dimensional Fund Advisors ([DFA](#)), offer broad global diversification for advisors and their clients who seek to put the factors of return the drive capital markets on their side. With over 25 years of evidence-based investing experience, Loring Ward helps advisors manage or administer over \$34 billion in assets.

"Not only does the addition of Loring Ward expand our offering to advisors, but it aligns soundly with Folio's ongoing commitment to diversification, scalability, and efficiency" adds Greg Vigrass, President of Folio Institutional. "For advisors, working with Loring Ward is like outsourcing your CIO solution."

About Loring Ward:

Loring Ward (BAM Advisor Services d/b/a Loring Ward) is committed to creating a better wealth experience for Financial Advisors and their clients across the U.S. For more than 25 years, the firm has strived to do this by empowering Advisors with Investment and Advisor Solutions that can help increase the probability of delivering a great experience for their clients. We have a large network of independent Advisors in the United States and are located in Silicon Valley, California and St. Louis, Missouri. Loring Ward's Asset Class Investing philosophy is based on more than nine decades of data, analysis and research, insights from behavioral finance, and close relationships with leading academics, including Loring Ward Investment Research Committee Members Dr. Meir Statman and Nobel Laureate, Dr. Harry Markowitz. As of September 30, 2019, Loring Ward has more than \$34 billion in assets under management or administration. For more information, please visit www.loringward.com. All named third party companies are unaffiliated with BAM Advisor Services d/b/a Loring Ward.

About Folio Financial:

Folio Financial is an innovative market leader that owns and operates a unique self-clearing broker-dealer and FinTech company. Among its activities, Folio develops and supports digital-first investment platforms for advisors and enterprises, fully integrated with its subsidiary's brokerage, clearing and custody solutions. Folio utilizes technology to fulfill its mission while embracing diversification and low cost as core principles, along with consistent investing, tax efficiency and personalization. Its key business segments currently are RIAs, asset and wealth managers, TAMPs, other broker-dealers and financial institutions such as banks and credit unions, as well as other FinTech firms, including robo advisors. Folio's businesses include [Folio Institutional](#), focused on providing innovative solutions for RIAs and enterprises including its state of the art digital wealth advisor platform for advanced hybrid and robo advisor offerings; [VIA Folio](#), an end-to-end investing platform for private investments available to both institutional and retail investors; [First Affirmative Financial Network](#), the leading advisor network serving the responsible investment community; [The SRI Conference and Community](#), the nation's premier conference on impact investing; and [Folio Investing](#) and [Folio First](#) for self-directed retail investors. Folio's offerings are available directly as fully-hosted solutions or through hundreds of APIs allowing a firm to build and control its own client experience.

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