

“A better Wealth solution” - Crossbridge Capital boldly empowering Financial Advisors in Asia

- *Crossbridge Capital is now working with powerhouse Dimensional Fund Advisors to provide a comprehensive wealth solution to financial advisors and their clients*
- *Combines Dimensional’s wealth of resources and experience with tailored investment strategies on the intuitive CONNECT by Crossbridge digital platform*
- *Goal is to offer the right team, tools, and insights to help advisors consistently deliver a better wealth experience for their clients.*
- *The Turnkey Asset Management Platform (TAMP) Service is one of the first in Asia and will enable Crossbridge Capital to tap the growth of white-labelled asset management solutions in the region*

(Singapore) 18 May 2020 – Crossbridge Capital (“Crossbridge”), the leading independent global wealth manager with approximately US\$4 billion under advisement, today announced it will be working closely with Dimensional Fund Advisors (“Dimensional”), a global leader in asset management with global assets under management of US\$609 billion as of December 31, 2019, as part of its commitment to empower financial advisors to focus on delivering a true value-added service to their clients.

Well-known for its investing model which is based on the science of capital markets and rooted in research from the top minds in financial academia, Dimensional works with a select group of Financial advisory firms in Asia. Crossbridge clients will not only continue to benefit from the tailored investment strategies already available through the intuitive digital platform *CONNECT* but their investment solutions will now also be powered by Dimensional.

“We’re honoured to be selected by Crossbridge as the core investment manager on the new *CONNECT* platform. Crossbridge Capital is a progressive Independent Asset Manager in Singapore and we’re pleased to be working with them as they roll out a digital wealth management experience for other advisers,” said Joel Teasdel, Head of Wealth Management Group, Asia ex-Japan from Dimensional Fund Advisors Pte. Ltd.

“There is growth potential to bring digital TAMP solutions to Asia, as it has been a successful model in Europe, North America and Australia. Independent Wealth Management firms in Asia are increasingly looking for next-generation solutions to more effectively manage their client assets and accelerate business growth.”

“More and more financial firms are using or exploring the adoption of white-labeled asset management solutions as they seek to delegate aspects of their asset management business either for efficiency or revenue growth,” said Charlie O’Flaherty, Partner and Head of Digital Strategy and Distribution, at Crossbridge Capital Asia, “Working with Dimensional enables us to tap this growth by offering financial advisers and clients even more robust services and enhanced client cost benefits delivered through *CONNECT*”.

Strong Global Demand for TAMPs

The use of contracting providers and platforms like Turnkey Asset Management Platforms (TAMPs) has increased sharply in recent years as financial advisers seek ways to deepen customer relationships and differentiate themselves in a crowded market. TAMPs help advisers to better focus on business growth and client relationships by providing outsourced investment management, technology, and back-office workflows.

Over the past five years, the independent channel has grown faster than the traditional channel (11% per year versus 9%) while independently advised assets are expected to increase from US\$8.4 trillion in 2017 to US\$12.1 trillion in 2022, representing about 48% of overall adviser assets¹. As a result, the value of assets managed on TAMP platforms is also predicted to expand from US\$7.4 trillion in assets in 2018 to US\$13 trillion by 2024².

With only an estimated 27% of financial advisers currently outsourcing investment management via TAMPs³ there is significant room for further growth. By working with Dimensional, Crossbridge is making access to the advantages and benefits of using TAMPs widely available to financial advisers in Asia for the first time.

By outsourcing investment and portfolio management to Crossbridge, financial advisers will be able to offer more holistic financial planning services and use the increased client facing time to deepen client relationships.

Aligning Investment Strategies for a Better Investment Experience

The new investment solutions with Dimensional will enable Crossbridge and its partners to more effectively align investment strategies for their clients to focus on four key tenets:

1. Goal-based investment: Crossbridge will utilise its understanding of its clients to recommend different portfolios tailored to clients' various investment goals and risk appetites.
2. Long-term investment: a long-term outlook smooths impact from market volatility by cutting down the noise and removing emotion from the equation.
3. Global diversification: Diversified investment portfolios allow Crossbridge to offer more stable returns.
4. Fee efficiency: Clients are able to leverage low, all-in fees to maximise performance and returns.

Charlie O'Flaherty, Partner and Head of Digital Strategy and Distribution, at Crossbridge Capital concluded: "We want to empower our financial advisers to focus on their true value-add – the deepening of client trust and relationships allowing them to grow their businesses while we provide investment insights, support and process automation."

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¹ [The Motley Fool](#)

² [Tiburón Strategic Advisors](#)

³ [Investment News](#)



For media enquiries and interview opportunities, please contact:

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About Crossbridge Capital

Crossbridge Capital was launched in 2008 in London with a vision to create an independent, investment advisory firm that offers a fully integrated financial services platform to entrepreneurs and families in Emerging Markets worldwide. Today, backed by two of the world's leading banks as minority investors, Crossbridge Capital operates in many of the world's leading Emerging Markets supported by a team of professionals in four Crossbridge Capital locations: London, Singapore, Monaco and Malta. After its successful launch in London with authorisation and regulation by the Financial Conduct Authority (FCA), in November 2010 Crossbridge Capital officially opened its first Asia office in Singapore after receiving approval from the Monetary Authority of Singapore (MAS). In May 2016 the company opened its doors in Monaco after receiving authorisation from the Commission for the Control of Financial Activities (CCAF). These signalled significant landmarks in the company's history and set the bar for its ambitious, yet considered geographic and client engagement growth strategy. More information can be found at www.crossbridgecapital.com

About Dimensional Fund Advisors:

Dimensional is a leading global investment firm that has been translating academic research into practical investment solutions since 1981. Guided by a strong belief in markets, we help investors pursue higher expected returns through a systematic investment process that integrates research insights with advanced portfolio design, management, and trading, while balancing tradeoffs that can impact returns. With clients around the world, Dimensional has 13 offices in nine countries and global assets under management of US\$609 billion as of December 31, 2019. Dimensional Fund Advisors Pte Ltd holds a capital markets license for fund management and is an exempt financial adviser under Singapore law serving accredited and institutional investors as defined under the Securities and Futures Act. More information can be found at www.sg.dimensional.com