



DEPLOY

Your Total *Portfolio* Solution.

A Unified Platform for Seamless Management

Streamline Your Managed Accounts Business

Deploy is a comprehensive platform solution that streamlines every stage of your managed accounts business—from product distribution to client allocation, execution, and ongoing portfolio management. By integrating your entire investment workflow, Deploy reduces overhead, boosts efficiency, and optimizes daily operations.

Key Value Drivers



Reach Advisors Directly Without Technology Barriers

Deploy provides a single branded platform that streamlines everything from product distribution to client allocation—eliminating technology blockers and keeping vendor sourcing out of your clients' hands.



Protect Portfolio Integrity

Minimize market price discrepancies and reduce exposure to timing risks with faster, synchronized trade execution from one distribution platform.



Designed for Scale and Efficiency

Deploy streamlines operations, reduces overhead, and simplifies distribution—freeing you to focus on expanding your advisor relationships and growing AUM.



Core Capabilities



Centralized Portfolio Management

Offer and adjust your full suite of portfolios from one centralized interface.



Flexible Distribution Options

Offer strategies exclusively to direct clients or expand through the SMartX Unified Managed Accounts platform.



Branded Experience

Use SMartX's native interface or embed capabilities directly into your platform via modular, modular web components & API-driven architecture.



Advanced UMA Infrastructure

Rep-directed, model-traded, manager-traded, tax-transition, cash management, & protected sleeves—all within a single account.



Real-Time Trade Execution

Corresponding trades are implemented across all linked client accounts, irrespective of custodian, ensuring a synchronized representation of the investment strategy.



Configurable Fee Structures

Customize management fees to align with your business model.

Close the Gaps. *Expand* Your Reach.

Deploy gives asset managers the power to scale efficiently, distribute quickly, and deliver their products directly to advisors—all through one powerful platform.