



# Alts Democratized: A Practical Guide to Alternative Mutual Funds and ETFs for Financial Advisors (Wiley Finance)

*Jessica Lynn Rabe, Robert J. Martorana*

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## **A Comprehensive Review of the Liquid Alts Market and How '40 Act Products Can Enhance Client Portfolios**

Liquid alternatives give investors access to hedge fund strategies with the benefits of '40 Act products: lower fees, higher liquidity, greater transparency, and improved tax efficiency.

*Alts Democratized* is a hands-on guide that offers financial advisors and individual investors the tools and analysis to enhance client portfolios using alternative mutual funds and ETFs. Well-grounded in research and replete with more than 100 exhibits of Lipper data, *Alts Democratized* profiles the top ten funds in each of the eleven Lipper liquid alt classifications. This includes total net assets, fund flows, risk and return metrics, and the factor exposures that drive performance and help explain correlations to various forms of beta. Jessica Lynn Rabe and Robert J. Martorana, CFA, combine this research with a comprehensive framework for fund selection and portfolio construction to enhance the asset allocation process, facilitate portfolio customization, and manage client expectations.

In addition, the book includes functional perspectives on issues pertinent to financial advisors such as fees, client suitability, and volatility management. This helps advisors apply the concepts to portfolios and offer actionable investment advice. The authors also interviewed executives at leading wealth management firms to provide color on industry trends and best practices.

The companion website provides ancillary materials that reinforce and supplement the book, including:

- The authors' top ten takeaways
- Classification cheat sheet
- Portfolio construction guide (full color)
- Talking points for clients
- Q&A on liquid alts
- Presentation with all 118 exhibits from the book (full color)

*Alts Democratized* comprises a complete resource for the advisor seeking new sources of alpha, diversification, and hedging of tail risks.

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