



NEWS RELEASE

For immediate release

For additional information contact:
Isaac Braley, BTS Asset Management
(800) 343-3040 ext. 343
ibraley@btsmanagement.com

Clare Bergquist, The Lowe Group
(414) 614-1583
clare@lowecom.com

BTS Select Bond Asset Allocation Portfolio Now Available on Placemark UMA Marketplace® Platform Advisors Seeking Alternative Strategies in Fixed Income

LEXINGTON, MA August 5, 2014 – BTS Asset Management is pleased to announce that their Select Bond Asset Allocation portfolio is now available to financial advisors on major RIA custodial platforms, through the Placemark UMA Marketplace® Platform.

“BTS is looking forward to bringing our tactical risk management portfolios to the Placemark UMA Marketplace Platform. We have seen increased demand from financial planners who are looking for alternative strategies in place of traditional fixed income assets,” according to Isaac Braley, President of BTS.

BTS believes in a capital preservation approach seeking to deliver consistent, steady returns over the long haul, while mitigating downside risk to the extent possible. BTS gives you the flexibility to choose an investment approach that matches your client’s financial goals and personal preferences. By employing tactical approaches in the portfolio, BTS’ goal is to reduce market volatility and generate more consistent returns over time. In an effort to accomplish this, BTS offers a variety of fee based tactical bond and equity programs—with the goal to:

- Produce higher investment returns than a “buy and hold” strategy
- Preserve capital during market declines
- Reduce downside investment volatility to manage for a positive “sequence of returns”
- Produce strong compounded investment returns over time

“We are excited to partner with BTS Asset Management and offer their strategies to advisors in UMA Marketplace®. We think BTS has an interesting approach that advisors will find

valuable in designing solutions for their clients,” says Lee Chertavian, Chairman and CEO of Placemark.

About BTS Asset Management

Founded in 1979, BTS is one of the nation’s oldest third party money managers, providing quantitative risk management and portfolio solutions for mutual fund and variable annuity clients looking for income and/or total returns over a three to five-year period. BTS has multi-year track records in tactical fixed income and equity management dating as far back as 33 years, providing advisors and clients alike with the experience and service of an established money manager.

About Placemark Investments

Placemark Investments develops wealth management solutions including Unified Managed Account programs and other portfolio management outsourcing solutions, enabling Registered Investment Advisors to scale their business and focus on growth objectives. Placemark’s UMA Marketplace® platform is a highly flexible UMA solution that provides RIAs a scalable way to create custom solutions for their clients utilizing any combination of mutual funds, ETFs, and managed account strategies. UMA Marketplace® offers a full suite of services and is integrated with leading custodial platforms, performance reporting vendors, and research providers to the wealth management industry.

###