EDITOR'S NOTE

Anthony B. Davidow, CIMA®

In this issue of the *Investments & Wealth Monitor*, we explore advanced asset allocation strategies and consider how advisors should evolve their approaches. This is particularly timely given the concerns regarding the traditional 60/40 portfolio. With equity returns expected to be lower than historical norms, and generationally low fixed income yields, advisors may need to consider expanding the number of asset classes used in building portfolios.

Let's begin with an article from Scott Welch, editorial board member and treasurer of the Investments & Wealth Institute board of directors, and Joseph Tenaglia, "Investing in a 'Post 60/40' Market Regime," followed by my article, "Is Modern Portfolio Still Modern?" and editorial board member Bruce Stewart's "Introduction to Regime-Based Asset Allocation."

We consider the growth of model portfolios with two terrific articles: "Model Portfolios: Understanding the Asset Allocation Model Landscape," by Cerulli Associates; and "Model Portfolios: Simplify, Scale, and Succeed with Model Portfolios," by Michael Stillitano, Ted Dimig, and Sharika Cabrera.

Nick Veronis and Tatiana Esipovich examine "Private Equity Offers Resilience in a Downturn," and Patrick Newcomb explores product innovation in "Interval Funds: Addressing the Needs of High-Net-Worth Investors." Curt Overway offers his insights with "A Bird in the Hand: Improving After-Tax Returns for Clients."

Brian Langstraat explores the growing trend of "Direct Indexing," and Keith Black and Aaron Filbeck consider "The Next Decade of Alternative Investments." Kathryn Kaminski closes out the issue with "Crisis or Correction? A Quant's View of the Coronavirus."

We hope that you are taking advantage of the Exceptional Advisor Webinar Series (https://investmentsandwealth.org/online-catalog/virtual-events), which is often taken from the pages of *Investments & Wealth Monitor*.

Be safe and be well!

Anthony B. Davidow, CIMA®
Chair, *Investments & Wealth Monitor*
Editorial Advisory Board

INVESTMENTS & WEALTH MONITOR **editorial calendar**

SEPTEMBER/OCTOBER 2020
{ EDITORIAL FOCUS }
PRIVATE WEALTH MANAGEMENT

NOVEMBER/DECEMBER 2020
{ EDITORIAL FOCUS }
BEHAVIORAL SCIENCE

JANUARY/FEBRUARY 2021
{ EDITORIAL FOCUS }
GLOBALIZATION IN A POST-PANDEMIC WORLD