Portfolio construction is arguably the one most important deliverable we provide for our clients. Portfolio construction is so important because it’s how we help clients achieve their goals. Top-notch portfolio construction starts with the right asset allocation.

In this issue of Investments & Wealth Monitor, we examine the evolution of asset allocation and portfolio construction, the best tools available to advisors, and how they should be used to effectively allocate assets and construct successful client portfolios.

For starters, Scott Welch gives us a retrospective in “Coming to Portfolios Near You: Investment Ideas You Should Be Paying More Attention To (The Sequel).” We asked Welch, an Investments & Wealth Institute board member and I&WM editorial advisory board member, to revisit predictions he made more than a decade ago and assess whether (or not) they’ve ever come to be. In “Post-‘Groundhog Day’ Asset Allocation,” Theodore Enders warns us to really know what we are buying when we buy equities; Adam Hets adds his perspective on the fixed-income portion with “Navigating Income Innovation: Simplify Modern Fixed Income with a Goals-Based Approach,” and Patrick Nolan addresses the bottom line in “Solving the Return Challenge.”


We also want to congratulate Margaret Towle, winner of the 2019 Investment Consulting Impact Award. She served as chair of the I&WM editorial advisory board, and editor—in-chief of the Journal of Investment Consulting. Our interview spotlights her career accomplishments and her approach to success.

As always, Managing Editor Debbie Nochlín and I welcome your input on future topics and authors. Feel free to reach out to us directly at dnochlin@investmentswealth.com and anthony.davidow@schwab.com.

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SEPTEMBER/OCTOBER 2019
(B EDITORIAL FOCUS )
BEHAVIORAL FINANCE

NOVEMBER/DECEMBER 2019
(B EDITORIAL FOCUS )
GOVERNANCE/ REGULATORY/ ETHICS/FIDUCIARY

JANUARY/FEBRUARY 2020
(B EDITORIAL FOCUS )
PRODUCT INNOVATION AND EVOLUTION