



Parti Pris Investment Partners And Syntax Data Announce Partnership



Sarah Grieco September 11, 2024

To satisfy the growing demand by wealth managers and investment advisors for more personalized portfolio management solutions, Parti Pris and Syntax Data have announced a partnership that enables advisors to manage their custom-developed indices from Syntax DirectSM on the Parti Pris Advisor WealthDesignTM SaaS platform (AWD).

Syntax Direct offers advisors a seamless front-to-back solution that covers every step of the index development process. Advisors can build custom benchmarks, core, factor, thematic, and impact strategies tailored to client preferences. The output includes back-tested performance, detailed sector breakdowns, statistical analysis, and an institutional-grade rulebook providing transparency into the exact methodology implemented.

“What attracted us to work with Syntax is their cutting-edge user interface. Their platform offering dovetails nicely with ours,” said Art Lutschaunig, CEO of Parti Pris.

“We are excited to work with Parti Pris to deliver a comprehensive wealth technology solution to financial advisors,” said Patrick Shaddow, CEO of Syntax Data.

This partnership enables advisors to serve more clients at lower cost. At a time when investment advisors face growing demands for customization and differentiation, the combination of the Parti Pris AWD and Syntax Direct platforms provide a timely and effective solution. Advisors can now seamlessly manage the entire portfolio process, allowing for scale and flexibility.

Parti Pris’ AWD is designed to enhance advisors’ household wealth management capabilities. Advisor WealthDesignTM simplifies and streamlines advisors’ practices and

enables them to automate and efficiently scale the delivery of personalized SMA, UMA, and household portfolios using multi-asset class model portfolios, direct indexing, or active management strategies. AWD represents an innovative step forward for the wealth management industry.

AdvisorWealthDesign™ builds on Parti Pris proprietary cloud-based portal Advisor SketchBook.™ SketchBook simplifies the portfolio design and implementation process, enabling wealth managers to expand their practices efficiently. With the personalization and household features in SketchBook, advisors can offer more sophisticated portfolios, differentiate their practices, and appeal to a broader investor audience.

About Parti Pris

Founded in 2019, the mission of Parti Pris is to enable financial advisors to simplify the delivery of personalized, tax-aware portfolios that build wealth for their clients. Parti Pris is a leading-edge developer of innovative technology, investment processes and methodologies designed to support the practices of wealth managers and advisors.

About Syntax

Syntax LLC is a financial data and technology company that codifies business models into a relational system we call Affinity Data™. Syntax operates through three segments: Affinity Data™, Syntax DirectSM, and Syntax Indices. Using its patented FIS® technology inspired by systems sciences, the Affinity Data™ segment offers the most comprehensive, granular, and accurate product line revenue data available on the market. The Syntax Direct™ segment then uses this abundance of data to facilitate the near instantaneous creation and ongoing management of boundless direct indexing solutions and rules-based equity portfolios through a fully automated platform. The Syntax Indices™ segment offers customized and proprietary indices, including core global benchmarks and micro- and macro-thematic, smart beta, defined outcome, and target volatility indices. These indices are foundational for a range of financial products, such as ETFs, UITs, and structured products.

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