

ETF Report

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ANNUAL

AWARDS

ISSUE

FINALISTS

ClearRock Capital

FIS Group

Heck Capital Advisors

Ritholtz Wealth Management

ETF INVESTOR OF THE YEAR

WINNER: CLS Investments

The ETF Investor of the Year award is a new one designed to go to the financial advisor, advisor team or institutional investor using ETFs to deliver high-quality portfolios in an innovative way. For that reason, ETF strategist CLS Investments has been selected as the first winner.

The Omaha firm’s “Risk Budgeting Methodology” drives its investment approach, and is based on the importance of accepting a certain level of risk; of measuring risk; and of combining risk management with asset allocation. It’s an approach that focuses on ETF-based portfolios intended to meet the accumulation, income, protection and/or tax management goals of individual investors.

It’s no surprise that the innovative firm now offers its Smart ETF Models, which are

available on several prominent platforms. CLS offers these models for a variety of risk tolerance levels. Each model typically contains 12-18 globally diversified actively managed or smart beta funds from several premier ETF providers, and is offered at a 0% strategist fee.

Beyond CLS’ investment methodology, the firm writes and speaks frequently about its approach, including at ETF.com and through weekly multi-media commentary, and strives to educate investors regarding general investment ideas. This adds to the firm’s transparency not just in how they invest, but why.

CLS was one of the earliest adopters of ETFs, and one of the industry’s staunch supporters in the advisory community.