

GeoWealth Expands Portfolio Offering with VanEck's Muni Allocation Model

Latest fixed income portfolio addition provides financial advisors with potential for greater downside protection during periods of heightened credit risk in a shifting macro-economic environment

Chicago, Illinois, Oct. 29, 2019 – [GeoWealth](#), a leading financial technology and investment advisory firm, today announced the addition of VanEck to its next-generation, turnkey asset management platform (TAMP).

With the addition of the VanEck municipal bond ETF portfolio, GeoWealth will provide advisors access to a tax-sensitive income generation solution for their clients, which is unique in the model marketplace.

“We’re continually expanding the roster of model portfolios from industry leaders available through our TAMP, and building out our fixed income-oriented offering is a key part of that strategy,” said Colin Falls, president of GeoWealth. “Providing a tax-sensitive strategy through VanEck’s model gives registered investment advisors (RIAs) a sophisticated income generation solution to complement our menu of model offerings.”

The VanEck municipal bond ETF strategy will prioritize tax-exempt income as well as capital appreciation. The model will make allocation decisions based on interest rates and credit opportunities, and will be available through GeoWealth’s integrated technology platform.

“Our mission is to provide investors with smart strategies to help identify impactful investment opportunities,” said David Schassler, portfolio manager and head of portfolio and risk solutions group at VanEck. “We’re very pleased to join GeoWealth’s platform and offer our municipal allocation strategy to GeoWealth’s investor community, so these advisors can fully leverage our fixed income capabilities to the benefit of their clients.”

The addition of the VanEck model comes shortly after GeoWealth added models from [Fidelity Investments](#) to its model marketplace. In Q4 2018, J.P. Morgan made a strategic investment in GeoWealth to support the expansion of its platform and growth of the distribution network.

For more on GeoWealth’s technology and investment management solution, visit geowealth.com.

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About GeoWealth

GeoWealth’s cloud-based financial technology platform empowers advisors to grow faster and to serve their clients more efficiently. With over 500 advisors and more than 50,000 accounts on its platform today, GeoWealth provides advisors flexible portfolio management, performance reporting, billing and risk profiling. GeoWealth also offers a diversified lineup of turnkey model portfolios. More information is available at <http://www.geowealth.com>.

About VanEck

VanEck has a history of looking beyond the financial markets to identify trends that are likely to create impactful investment opportunities. We were one of the first U.S. asset managers to offer investors access to international markets. This set the tone for the firm's drive to identify asset classes and trends – including gold investing in 1968, emerging markets in 1993, and exchange traded funds in 2006 – that subsequently shaped the investment management industry.

Today, VanEck offers active and passive strategies with compelling exposures supported by well-designed investment processes. As of September 30, 2019, VanEck managed approximately \$49.5 billion in assets, including mutual funds, ETFs and institutional accounts. The firm's capabilities range from core investment opportunities to more specialized exposures to enhance portfolio diversification. Our actively managed strategies are fueled by in-depth, bottom-up research and security selection from portfolio managers with direct experience in the sectors and regions in which they invest. Investability, liquidity, diversity, and transparency are key to the experienced decision-making around market and index selection underlying VanEck's passive strategies.

Since our founding in 1955, putting our clients' interests first, in all market environments, has been at the heart of the firm's mission.