



The Team at Dashboard Wealth Advisors expands its portfolio management capabilities

FOR IMMEDIATE RELEASE

November 30, 2016 – Oak Brook, IL – The advisors at Dashboard Wealth Advisors (“Dashboard”) announced today that it has expanded its investment management capabilities by engaging with Tidal Growth Consultants (“Tidal”), a consulting firm headquartered in Manhattan, NY, providing Outsourced CIO services to financial advisors.

The Dashboard Team strives to continue improving its outstanding wealth advisory services to its clients by adding Tidal’s investment process rigor and a system of checks and balances to its portfolio management process.

Through Tidal’s outsourced CIO services, Dashboard is significantly growing the depth of its investment research and portfolio management capabilities, adding discipline and oversight to their team’s investment and wealth management process, and formalizing a structure of benchmarks and performance measurement.

“At Dashboard we use our experience and expertise to help ensure that our client’s life goals are met through our comprehensive financial planning process” said Scott Schuster, CFP®, CPA, Managing Director at Dashboard. “In Tidal Growth Consultants we saw a key ally to propel the expansion of our investment management capabilities to provide our clients with the best practices and strategies in the market and help them reach their financial goals.”

“Dashboard is in a unique position to help its clients with their financial and investment goals” said Guillermo Trias, CEO of Tidal. “They are a breath of fresh air in the highly commoditized financial advisory industry, providing high level personalized advice to their clients in a challenging and continuously evolving market environment.”

About Dashboard

Dashboard is an independent Firm headquartered in Oak Brook, IL with a team who specializes on providing highly custom and personalized wealth advisory services for investors, with a laser focus on financial planning. Its “dashboard” planning process allows their clients to focus on the entirety of their financial picture throughout their lifetime.

About Tidal Growth Consultants

Tidal Growth Consultants, a dba of Toroso Investments, LLC, is a group of finance thought leaders helping Financial Advisors seeking best practices in their investment process so they can adapt to the fast evolving needs of their clients and the ever changing landscape of market regulations”.

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