Who is inCadense?

Building the Infrastructure for the Next Generation of Global Managed Accounts

Wealth management is entering a new era. Investors are demanding greater transparency, deeper personalization, broader global access and investment solutions that reflect their individual circumstances rather than generic product models. Advisors are moving from product selection to portfolio construction, from transaction-based relationships to fee-based advice, and from selling investment vehicles to delivering long-term outcomes

inCadense was created to support this shift.

inCadense is a global managed account solutions provider built to help wealth managers, advisors, asset managers and financial institutions design, launch and scale sophisticated managed account programs across international markets. The firm combines technology, investment operations, overlay management, trading infrastructure and global implementation expertise into a unified ecosystem designed for personalized wealth management.

At its core, inCadense exists to make institutional-quality managed account capabilities available across global wealth markets. The firm supports separately managed accounts, unified managed accounts, ETF model portfolios, multi-manager solutions and customized investment programs across multiple custodians, currencies, jurisdictions and client segments.

The opportunity is clear. Managed accounts create a powerful framework for aligning investors, advisors and asset managers around customized portfolios, direct ownership, transparency and ongoing portfolio management. Yet outside the United States, the infrastructure to deliver managed accounts at scale remains fragmented, inconsistent and operationally difficult. inCadense was built to address that gap.

inCadense's Mission

For decades, the investment industry has focused heavily on products. Mutual funds, ETFs, structured products and private funds each play important roles, but they are ultimately standardized vehicles. They are built to serve many investors at once, not to reflect the unique objectives, preferences, tax circumstances, legacy holdings, restrictions or geographic needs of a specific investor.

The next phase of wealth management innovation is not simply about creating more products. It is about improving how investment solutions are delivered.

Managed accounts represent that next phase. They allow an investor to own an individualized portfolio while still benefiting from professional management, institutional investment processes, advisor oversight and scalable implementation. They create a structure where the investor, advisor and asset manager can be more closely aligned.

inCadense was founded on the belief that this model should not be limited to the U.S. domestic wealth market. International investors, private banks, family offices, offshore wealth platforms and global advisors need the same level of transparency, personalization and institutional implementation. Delivering that globally requires specialized infrastructure across currencies, custodians, trading workflows, overlay management and operational coordination.

That is the role inCadense plays.

What We Do

inCadense helps financial institutions transform investment ideas into implementable managed account solutions.

The firm works across the full managed account lifecycle, from program design and investment solution development to operational implementation, trading support, portfolio administration and ongoing platform management. This allows clients and partners to move from concept to execution without having to build an entire managed account operating platform internally.

inCadense supports SMA and UMA programs, ETF model portfolios, manager model delivery, asset manager SMA enablement, multi-manager structures, advisor-led portfolio programs and cross-border investment solutions. The firm brings together the strategy, infrastructure and operational capability required to launch and scale these programs in real-world wealth management environments.

For wealth managers, inCadense supports fee-based advisory growth, advisor differentiation and personalized client portfolios. For asset managers, it creates a path to convert investment strategies into SMA-ready solutions that can be delivered through wealth platforms. For advisors, the ecosystem supports flexible portfolio construction, deeper client alignment and access to institutional investment capabilities. For institutions, inCadense offers a turnkey infrastructure path that avoids the cost, complexity and execution risk of building from scratch.

The Ecosystem

The inCadense ecosystem brings together three core components: inCadense, iTAMP and iH2 Advisors & Company.

inCadense serves as the strategic and commercial solutions organization. It works with asset managers, wealth managers, custodians, platforms and advisors to define managed account opportunities, structure solutions, develop programs, support distribution and coordinate implementation. It is the business architecture layer that helps translate market need into executable investment programs.

iTAMP, the International Turnkey Asset Management Platform, is the technology and operating infrastructure that powers the ecosystem. It supports the core functions required for global managed account delivery, including portfolio accounting, rebalancing, model administration, proposal analytics, performance reporting, fee calculations, trading workflows, household administration, custodial integration, trade aggregation, account-level customization and multi-currency portfolio administration.

iH2 Advisors & Company is the affiliated SEC-registered investment adviser that provides overlay management and investment implementation capabilities. iH2 serves as the regulated implementation layer that helps convert investment models into managed account portfolios. Its role includes model implementation, rebalancing oversight, sleeve coordination, trade coordination, portfolio administration and account-level investment operations.

Together, these capabilities create a unified managed account operating framework. The result is not simply a technology platform, consulting business or investment adviser operating independently. It is an integrated ecosystem designed to support the full complexity of global managed account delivery.

The Global Opportunity

Delivering a managed account program in a single domestic market is already operationally complex. Delivering one globally is significantly more difficult.

International managed accounts must account for multiple currencies, multiple custodians, different settlement cycles, varying local market practices, ADR and ordinary share considerations, regional regulatory expectations, cross-border client relationships, tax-sensitive implementation, manager model delivery, portfolio dispersion, trading restrictions and reporting requirements across jurisdictions.

Many legacy managed account systems were built for domestic U.S. programs and later adapted for international use. That approach often creates limitations. Global wealth management requires infrastructure designed from the beginning to handle international complexity.

inCadense approaches global managed accounts as a distinct operating discipline. Its platform and service model are designed to support the practical realities of cross-border investing, including multi-currency portfolios, multi-custodian environments, global execution, local market securities, UCITS and ETF implementation, international fixed income, ADR substitution, offshore wealth structures and advisor-led client relationships.

Multi-Currency. Multi-Custody. Multi-Jurisdiction.

A defining element of the inCadense model is its ability to operate across currencies, custodians and markets.

Modern international investors do not live inside a single currency or custody channel. They may hold assets in U.S. dollars, Singapore dollars, euros or local-market currencies. They may custody assets through global banks, U.S. custodians, local wealth platforms or offshore structures. They may require access to U.S. equities, international equities, fixed income, ETFs, UCITS funds or local-market securities.

inCadense is designed to support this complexity.

The platform supports multi-currency portfolio administration, cross-border implementation, open custody architecture, non-dollar trading considerations, global execution coordination, account-level customization and institutional rebalancing workflows. This allows investment strategies to be implemented in ways that better reflect the needs of international investors and global wealth managers.

Who We Serve

inCadense serves a broad set of participants across the wealth management ecosystem.

For wealth managers and private banks, inCadense provides infrastructure to support fee-based advisory, discretionary portfolio management and scalable managed account programs.

For advisors, inCadense supports personalized client portfolios, direct ownership structures, institutional investment access and stronger advisor-client relationships.

For asset managers, inCadense provides a pathway to deliver strategies through SMA, UMA and model-based formats in new markets and channels.

For family offices and multi-family offices, inCadense supports flexible portfolio structures that combine direct securities, ETF models, manager sleeves and customized allocations.

For financial institutions, inCadense offers a practical way to enter or expand managed accounts without building full technology, operations and overlay infrastructure internally.

Practitioner-Built

inCadense was founded and built by managed account practitioners with deep experience across the operating chain of wealth management, investment implementation and platform delivery. The team brings together professionals who have built managed account platforms, supported large-scale advisory programs, worked with global custodians, operated trading and rebalancing workflows, supported asset manager model delivery, and helped financial institutions move from investment concept to live client portfolios.

This practical background is central to the firm's approach. Managed accounts are not merely a product category; they are an operating discipline. They require experience across investment design, custody, account opening, proposal analytics, model administration, trading, allocation, rebalancing, reconciliation, reporting, billing, corporate actions, tax-lot management, client restrictions and advisor service. inCadense was built by people who understand those details and have operated inside those environments.

The broader team and advisory network bring experience across managed accounts, custody, trading, portfolio analytics, investment operations, compliance workflows, asset management, global wealth management, platform implementation, technology integration and international distribution. This breadth allows inCadense to work across multiple constituencies at once: asset managers designing SMA strategies, wealth platforms launching advisory programs, custodians supporting account infrastructure, advisors delivering client portfolios and operating teams responsible for day-to-day execution.

This practitioner-led orientation matters because managed accounts are execution-intensive. Success requires more than concept, branding or technology. It requires the ability to anticipate operational bottlenecks, design scalable workflows, support real accounts, manage exceptions, coordinate across counterparties and translate investment intent into implemented portfolios.

Global Reach

inCadense is built around a global view of wealth management.

The firm’s relationships and activities span the major regional wealth markets where managed account adoption, fee-based advisory growth and international investment demand are accelerating, including U.S. offshore wealth, Latin America, Asia-Pacific, EMEA and other cross-border wealth channels. This regional footprint reflects where global wealth is managed, where asset managers seek distribution and where advisors require more sophisticated investment delivery tools.

Across these regions, inCadense focuses on common challenges facing modern wealth platforms: how to deliver more personalized portfolios, support multiple currencies and custodians, bring global asset manager strategies into local markets, and transition from product-led distribution to fee-based portfolio advice.

This international perspective allows inCadense to understand the needs of both global asset managers and local wealth platforms. It also allows the firm to support programs that operate across more than one jurisdiction, currency, custodian or investor segment.

What We Believe

- Investors should have access to portfolios that reflect their individual needs, not just standardized pooled vehicles.
- Advisors should remain central to the client relationship and be equipped with better tools to deliver personalized advice.
- Asset managers should be able to deliver their investment expertise through modern implementation formats that preserve strategy integrity while meeting the needs of wealth clients.
- Technology should simplify complexity, not add another layer of fragmentation.
- Operations are not merely back-office functions. In managed accounts, operations are central to the client experience and investment outcome.
- Global investing requires infrastructure designed specifically for global complexity.
- Institutional-quality portfolio implementation should be available to a broader range of investors, not only to large institutions.

Looking Ahead

Managed accounts are becoming a defining structure for the next generation of wealth management.

The direction of travel is clear. Wealth management is moving toward fee-based advice, direct ownership, portfolio transparency, personalization, tax awareness, institutional implementation and global diversification. These trends all point toward greater adoption of SMAs, UMAs and model-based investment solutions.

inCadense was built for this environment.

The firm’s objective is to help modernize how investment solutions are delivered across global wealth markets. By combining managed account infrastructure, overlay management, global operating expertise and investment implementation capabilities, inCadense enables advisors, asset managers and institutions to bring more sophisticated portfolio solutions to more investors.

inCadense is not simply building another platform.

It is building the infrastructure for global managed accounts.

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inCadense

Institutional Infrastructure. Global Perspective. Personalized Investing.

inCadense helps wealth managers, advisors, asset managers and financial institutions deliver the next generation of managed account solutions across global markets.